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ABSTRACT

Developed in Illinois, this document contains three components. The first component consists of employability task lists for the business, marketing, and management occupations of first-line supervisors and manager/supervisors; file clerks; traffic, shipping, and receiving clerks; records management analysts; adjustment clerks; and customer representatives. The second component is made up of task analyses for small business owner/operators in the business ownership/management cluster. Duty areas analyzed include establishing a small business, planning and budgeting, managing business operations, managing human resources, extending credit, and performing merchandising duties. Each task analysis consists of the following: a performance standard, steps to be performed, knowledge and attitudes required, safety requirements, equipment and materials needed, source of the analysis, and the related Illinois State Goals for Learning. The third component of this document contains cluster matrices for business, marketing, and management occupations. Occupational clusters covered include accounting-bookkeeping, computer operation and programming, information processing, secretarial, general office clerk, product-oriented marketing, service oriented marketing, and business ownership/management. For each cluster, duties and tasks are listed with an indication of which occupations in the cluster perform them. (KC)

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TASK LISTS

FOR

BUSINESS, MARKETING

AND MANAGEMENT OCCUPATIONS

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CLUSTER MATRICES

FOR

BUSINESS, MARKETING

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ICBVE
"KEY TO EFFECTIVE LEARNING"

Illinois Competency Based Vocational
Education Project
Housed At: Lake County Area
Vocational Center
19525 West Washington Street
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Task Lists Developed by CBVE Business, Marketing and Management Consultant	Linda Lafferty Fonseca
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Education
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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

First Line Supervisor and Manager/Supervisor –
Clerical and Administrative Support Occupations
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these task lists form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

These materials were prepared under contract with the Illinois State Board of Education, Department of Adult, Vocational and Technical Education ("Illinois Competency Based Vocational Education Project," contract number PS-10-130).

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS: 1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS: 1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS: 1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS: 1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS: 1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

EMPLOYABILITY SKILLS

DUTY J: Understanding How a Business Works

SKILLS: 1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS: 1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

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FIRST LINE SUPERVISOR AND MANAGER/SUPERVISORS - CLERICAL AND ADMINISTRATIVE SUPPORT OCCUPATIONS

DUTY A: Processing Mail

TASKS:
1 Process incoming mail
2 Process outgoing mail
3 Maintain mailing list electronically

DUTY B: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers, such as numbers frequently called, emergency numbers or employee extension numbers
4 Maintain telephone listings on computer or word processor
5 Record outgoing long distance telephone calls
6 Determine telecommunication needs for office
7 Prepare cost justification for purchase or lease of telecommunications equipment or service
8 Order telecommunications equipment or service
9 Supervise changes in telecommunications equipment and service

DUTY C: Maintaining Office Supplies and Forms

TASKS:
1 Equip work station with supplies and forms
2 Prepare cost justification for purchase of office supplies and office forms
3 Order supplies and forms for office
4 Receive office supplies and forms
5 Store office supplies and forms
6 Issue office supplies and forms
7 Prepare office supply and office form inventory records manually
8 Process office supply and office form inventory reports on computer or word processor

DUTY D: Maintaining Office Equipment

TASKS:
1 Perform maintenance functions on photocopier, such as changing toner and replacing paper
2 Place service calls for office equipment
3 Schedule office equipment for routine maintenance
4 Prepare cost justification for purchase or lease of office equipment
5 Recommend purchase or lease of office equipment
6 Order office equipment
7 Receive office equipment
8 Inventory office equipment
9 Process office equipment inventory records manually
10 Process office equipment inventory records on computer or word processor
11 Supervise installation of office equipment
12 Process office equipment repair records manually

13 Process office equipment repair records on computer or word processor
14 Determine software needs
15 Determine office equipment needs
16 Determine work station furniture needs
17 Prepare cost justification for purchase of software
18 Purchase software for specific business application
19 Supervise installation of software
20 Update software
21 Monitor hardware and software for working condition
22 Maintain inventory records for software
23 Requisition office equipment

DUTY E: Organizing and Planning

TASKS: 1 Plan office layout and workflow
2 Establish system to prioritize work
3 Prioritize work
4 Establish procedures for use of clerical/administrative services
5 Update clerical/administrative services activities
6 Establish clerical/administrative services production standards
7 Update clerical/administrative services production standards
8 Establish system for logging work in and out
9 Establish clerical/administrative services chargeback costs
10 Conduct tours of clerical/administrative services area
11 Train users of clerical/administrative services
12 Develop clerical/administrative services operating budget
13 Analyze operating results in relation to budget
14 Design clerical/administrative services forms
15 Establish procedures for securing confidential information
16 Prepare statistical reports on clerical/administrative services productivity
17 Prepare reports on chargeback costs
18 Maintain safe, comfortable working environment

DUTY F: Performing Clerical Activities

TASKS: 1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Put up bulletin board display
4 Clean and straighten up work area

DUTY G: Filing Materials Manually

TASKS: 1 Establish manual filing system
2 Establish cross-referencing system
3 Establish file index system
4 Establish file checkout system
5 Establish record retention policies
6 Update cross-referencing system and file index system
7 Revise file checkout system

8 Update filing system and files
9 Arrange for filing of special materials
10 Establish system for filing magnetic media
11 Establish system for storing backup copies of diskettes
12 Establish system for storing software
13 Establish system for securing classified or confidential materials

DUTY H: Supervising and Training

TASKS: 1 Determine personnel needs
2 Prepare detailed job description for each position
3 Apply hiring policies and procedures
4 Recruit employees
5 Select job applicants for interviews
6 Interview applicants for employment
7 Recommend applicants for hiring
8 Maintain personnel records manually
9 Maintain personnel records on computer or word processor
10 Orient new employees
11 Assign work to others
12 Monitor employees' performance
13 Counsel employees
14 Prepare employee evaluation reports
15 Resolve employee problems
16 Develop employee training programs
17 Conduct staff meetings
18 Schedule vacations
19 Maintain file of job openings
20 Evaluate work methods and procedures
21 Discipline employees
22 Discharge employees
23 Assist employees to resolve user problems
24 Interpret company personnel policies and procedures
25 Demonstrate equipment use

DUTY I: Preparing Written Communications

TASKS: 1 Compile information for reports or correspondence
2 Compose correspondence
3 Compose reports
4 Edit documents
5 Prepare and send cablegrams, telegrams and mailgrams
6 Dictate documents
7 Abstract materials, such as articles, books or reports
8 Compile statistical data
9 Compose speeches
10 Prepare and make oral presentations
11 Prepare visual aids
12 Prepare clerical/administrative services staff procedures manual
13 Update clerical/administrative services staff procedures manual

14 Develop clerical/administrative services users manual
15 Update clerical/administrative services users manual

DUTY J: Performing Financial Activities

TASKS: 1 Control petty cash fund
2 Approve bills for payment
3 Manage cash advance account

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Education
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Illinois
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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

File Clerks
*Employability Skills

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4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
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5 Minimize occurrence of problems
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DUTY J: Understanding How a Business Works

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FILE CLERKS

DUTY A: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls

DUTY B: Maintaining Office Equipment

TASKS:
1 Perform maintenance functions on photocopier, such as changing toner and replacing paper
2 Repair minor equipment malfunctions
3 Report equipment malfunctions to supervisor

DUTY C: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Clean and straighten up work area
4 Equip work station with supplies and forms

DUTY D: Filing Materials Manually

TASKS:
1 Code materials for filing
2 Sort materials for alphabetic filing
3 Sort materials for numeric filing
4 Sort materials for subject filing
5 Sort materials for geographic filing
6 Sort materials for color-coded filing system
7 File materials using alphabetic filing system
8 File materials using numeric filing system
9 File materials using subject filing system
10 File materials using geographic filing system
11 File materials using color-coded filing system
12 Retrieve materials from files
13 Follow established filming procedures for microfilm or microfiche
14 File microfilm or microfiche
15 Retrieve materials stored on microfilm or microfiche
16 Locate misfiles
17 Apply established records retention policies
18 Transfer materials to inactive files
19 Purge files
20 Complete cross-reference sheet
21 Process outguides
22 Secure classified or confidential materials

DUTY E: Maintaining Filing System

TASKS:
1 Replace worn file folders and labels
2 Prepare new file folders
3 Replace worn and damaged guide cards
4 Type information on file folder labels
5 Inspect files for accuracy
6 Label file boxes and containers for storage

7 Requisition filing supplies
8 Maintain file checkout system
9 Follow up on overdue files

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Education
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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

Traffic, Shipping and Receiving Clerks
*Employability Skills

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3 Prepare for interview
4 Participate in interview
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6 Complete required forms
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9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS: 1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS: 1 Exhibit dependability
2 Demonstrate punctuality
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DUTY E: Maintaining Safe and Healthy Environment

SKILLS: 1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
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6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
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DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
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5 Seek work challenges
6 Adjust career goals/plan as needed

EMPLOYABILITY SKILLS

DUTY J: Understanding How a Business Works

SKILLS: 1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
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DUTY K: Performing Mathematical Skills

SKILLS: 1 Apply mathematics for problem solving
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TRAFFIC, SHIPPING AND RECEIVING CLERKS

DUTY A: Receiving, Storing and Maintaining Incoming Merchandise

TASKS:
1 Assist carrier unload (off-load) merchandise
2 Check invoice against purchase order
3 Mark identification on incoming shipment
4 Check number of cartons against bill of lading, freight bill or manifest
5 Inspect incoming cartons or containers for damage
6 Deliver incoming shipment to storage or work area
7 Unpack incoming shipment
8 Check unpacked merchandise against invoice or packing slip
9 Inspect unpacked merchandise for damage
10 Sort unpacked goods according to identification codes
11 Store unpacked merchandise in bins, racks or shelves in stockroom
12 Clean stockroom
13 Conduct on-going physical inventory of stock
14 Conduct periodic physical inventory of stock
15 Ticket/mark received goods

DUTY B: Assembling, Packing and Shipping Merchandise

TASKS:
1 Affix postage to outbound shipment
2 Assemble goods for packing
3 Load outbound shipment for carrier
4 Mark identifying information and shipping instructions on outbound shipment
5 Pack outbound shipment
6 Verify outbound shipment with shipping records
7 Weigh outbound shipment
8 Move outbound shipment to shipping staging area

DUTY C: Performing Administrative Functions

TASKS:
1 Assign shipping priorities for outbound goods
2 Assign storage space to new goods
3 Maintain bills of lading register
4 Maintain receiving apron
5 Maintain receiving log (tally)
6 Maintain inventory records
7 Prepare bills of lading
8 Prepare claims for incorrect or damaged goods received
9 Prepare inventory report
10 Prepare receiving report
11 Prepare overage, shortage and discrepancy (OSD) report
12 Process shipping papers on received shipment
13 Provide information to customer on outbound shipment
14 Record outbound shipment in shipment log
15 Requisition inhouse supplies or equipment
16 Seal door(s) of carrier
17 Select required materials-handling equipment for job
18 Select route and carrier for outbound shipment

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Education
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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

Records Management Analyst
*Employability Skills

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SKILLS: 1 Match interest to job area
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DUTY E: Maintaining Safe and Healthy Environment

SKILLS: 1 Comply with safety and health rules
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DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
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DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
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DUTY K: Performing Mathematical Skills

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RECORDS MANAGEMENT ANALYST

DUTY A: Inventorying Records

TASKS: 1 Develop inventory plan
2 Determine inventory criteria
3 Perform inventory
4 Prepare summary of findings

DUTY B: Developing Retention Schedules

TASKS: 1 Determine current retention practices
2 Review inventory
3 Organize inventory into record series
4 Analyze record types
5 Identify vital records
6 Research governmental and operational requirements
7 Determine retention periods
8 Publish retention schedules
9 Coordinate record disposition

DUTY C: Developing Filing/Retrieval Systems

TASKS: 1 Analyze use of records
2 Determine manual versus automated applications
3 Establish classification and indexing criteria
4 Design filing/retrieval systems
5 Prepare cost analysis
6 Develop proposal for file conversion
7 Coordinate file conversion

DUTY D: Assessing Equipment and Space

TASKS: 1 Review current layout
2 Inventory equipment
3 Evaluate user needs
4 Evaluate new equipment for purchase
5 Design layouts
6 Prepare cost justification
7 Coordinate installation

DUTY E: Evaluating Emerging Technologies

TASKS: 1 Develop library of resources
2 Attend trade shows and seminars
3 Interview vendors
4 Visit user sites

DUTY F: Providing Litigation/Tax Support

TASKS: 1 Conduct document search
2 Retrieve requested documents
3 Index documents

4 Prepare records policies and procedures for deposition
5 Coordinate preparation of documents
6 Implement records disposition
7 Review hold status annually

DUTY G: Communicating

TASKS: 1 Provide accountability reports
2 Develop manuals
3 Provide training
4 Present workshops
5 Develop proposals
6 Develop professional contacts/networks
7 Participate in professional associations

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education
For
Employment
Task Lists

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

Adjustment Clerk
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these task lists form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

These materials were prepared under contract with the Illinois State Board of Education, Department of Adult, Vocational and Technical Education ("Illinois Competency Based Vocational Education Project," contract number PS-10-130).

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS: 1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS: 1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS: 1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS: 1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS: 1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

EMPLOYABILITY SKILLS

DUTY J: Understanding How a Business Works

SKILLS: 1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS: 1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

ADJUSTMENT CLERK

DUTY A: Contacting Customers Via Telephone, Mail or Direct Contact

TASKS:
1 Identify inquiry/complaint
2 Acknowledge receipt of customer complaint
3 Send information requested by customer
4 Refer customer to outside agency or department
5 Determine if further investigation is needed

DUTY B: Investigating/Analyzing Customer Complaint

TASKS:
1 Research customer records
2 Request further information from customer
3 Research company records
4 Compare customer and company records
5 Request information from outside agencies, departments or stores
6 Conduct in-depth investigation
7 Refer to other departments, stores or agencies

DUTY C: Investigating/Analyzing Customer Accounts

TASKS:
1 Spot-check accounts
2 Audit individual accounts
3 Update customer records
4 Investigate missing payments
5 Handle requests for lost/stolen credit cards

DUTY D: Resolving Customer Complaints

TASKS:
1 Explain the results of the investigation to customer
2 Confirm customer understanding/satisfaction
3 Process credits/debits
4 Process refunds
5 Explain company policies to customers
6 Recommend preventive measures to customers
7 Recommend cost-saving services
8 Make payment arrangements
9 Adjust customer's credit bureau records
10 Correct internal company records
11 Notify department or outside agency of resolution

DUTY E: Maintaining Professional Skills

TASKS:
1 Train new adjustment clerks
2 Cross-train in all aspects of the job
3 Update training and new procedures
4 Recommend internal improvements in company policies and procedures

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education
For
Employment
Task Lists

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

Customer Service Representative
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

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5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS: 1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
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5 Support and promote employer's company image and purpose
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7 Use telephone etiquette
8 Follow written and oral directions
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11 Prepare written communication
12 Utilize keyboarding skills
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3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS: 1 Recognize the role of business in the enterprise system
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5 Identify planning processes needed to open a business
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5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

CUSTOMER SERVICE REPRESENTATIVE

DUTY A: Contacting Customers Via Telephone, Mail or Direct Contact

TASKS:
1 Identify inquiry/complaint
2 Acknowledge customer request
3 Perform preliminary investigation
4 Refer request to appropriate department or outside agency
5 Resolve requests
6 Confirm customer understanding/satisfaction
7 Refer requests to superior if necessary

DUTY B: Providing General Services

TASKS:
1 Receive information from customers to update billing
2 Make payment arrangements
3 Provide special services for handicapped
4 Make appointments
5 Make delivery arrangements
6 Make pickup arrangements
7 Handle cancellation requests
8 Handle requests for catalogs/directories
9 Handle payments
10 Initiate requests for lost/stolen credit cards/payments

DUTY C: Taking Orders

TASKS:
1 Take new applications
2 Make changes in existing services
3 Transfer services
4 Take parts orders
5 Take orders for additional services
6 Handle special requests
7 Take catalog orders

DUTY D: Providing Information

TASKS:
1 Handle requests for mail-outs, such as payment envelopes and order forms
2 Answer general billing questions
3 Provide general information about company
4 Provide rate information
5 Refer customers to outside agencies
6 Provide specific product information
7 Explain bill calculations
8 Provide shipping information
9 Direct customers to other departments
10 Recommend cost-saving services

DUTY E: Maintaining Professional Skills

TASKS:
1 Train new customer service representatives
2 Cross-train in all aspects of the job
3 Update training and new procedures
4 Recommend internal improvements in company policies and procedures

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

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**Education
For
Employment
Task Lists**

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

1988

TASK ANALYSIS

FOR

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

CLUSTER: **BUSINESS OWNERSHIP/MANAGEMENT**

OCCUPATION: **SMALL BUSINESS OWNER/OPERATOR**

Duty Areas:
- Establishing a Small Business
- Planning and Budgeting
- Managing Business Operations
- Managing Human Resources
- Extending Credit
- Performing Merchandising Duties

ICBVE
"KEY TO EFFECTIVE LEARNING"

Illinois Competency Based Vocational
Education Project
Housed At: Lake County Area
Vocational Center
19525 West Washington Street
Grayslake, IL 60030-1194
(312) 223-6681 or 620-8770

Tasks Analyzed by CBVE Business, Marketing, and Management Consultant	Linda Lafferty
CBVE Project Director	Urban T. Oen, Ph.D.

TASK ANALYSIS
FOR
BUSINESS, MARKETING
AND MANAGEMENT OCCUPATIONS

CLUSTER: **BUSINESS OWNERSHIP/MANAGEMENT**
OCCUPATION: **SMALL BUSINESS OWNER/OPERATOR**
Duty Area: Establishing a Small Business

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Obtain technical assistance from professionals, such as attorneys, insurance agents and management consultants

PERFORMANCE STANDARD Technical assistance from qualified professionals will be used, as needed, while establishing and running the small business.

STEPS

1. Define problems which will require professional advice prior to taking action.
2. Identify appropriate types of professionals from whom to seek advice, such as:
    a. Attorneys.
    b. Bankers.
    c. Accountants.
    d. Management consultants.
    e. Investment brokers.
    f. Successful entrepreneurs.
    g. Government officials.
    h. Trade associations.
    i. Suppliers or vendors.
    j. Small Business Administration representatives.
    k. Technical professional consultants.
    l. Insurance company representatives.
    m. Local Chamber of Commerce representatives.
3. Review telephone and professional directories to obtain the names of qualified professionals from whom to obtain assistance.
4. Contact professional organizations, referral services and other entrepreneurs to obtain the names of qualified professionals from whom to obtain assistance.
5. Contact other entrepreneurs to determine quality of service obtained from or reputation of identified professionals.
6. Contact identified professionals to obtain information on their working methods and an estimate of the cost of assistance requested.
7. Establish a file of professional contacts in which to keep a record of costs, services provided and quality of services received.
8. Select professionals to contact when advice is needed based on competence, working methods and fee arrangements.
9. Contact professionals when assistance is needed.

KNOWLEDGE	Select qualified professionals from whom to seek advice. Determine appropriate times to seek advice from professionals. Locate low-cost or no-cost professionals from whom to seek advice (Chamber of Commerce, college or university classes, Small Business Administration, Better Business Bureau, trade associations, credit bureau, public library, Bureau of Census, Internal Revenue Service and other government agencies). Seek assistance from professional organizations, referral services and other successful entrepreneurs in selecting qualified professionals. Determine the exact cost of professional services prior to using them. Recognize that professionals provide advice but that the business owner is ultimately responsible for all decisions. Use sources, such as telephone directories and Chamber of Commerce directories, to locate qualified professionals.
ATTITUDES	Seek advice from professionals to increase business success. Realize that a small business owner/operator cannot be an expert on everything. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of business failure by seeking professional advice. Read all contracts carefully prior to signing them, and consult attorney if needed.
EQUIPMENT AND MATERIALS	Professional directories Telephone directory City directory List of professional organizations List of community college or university contact people List of business organizations for small business owners List of professional referral services Professional contact file
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:

- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:

- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Conduct market survey

PERFORMANCE STANDARD Market survey will be conducted to determine if adequate market exists for business being considered.

STEPS

1. List market research goals.
2. Determine geographic area (international, nationwide, statewide, county, city or section of city) for which market research data is needed.
3. Determine types of market research data that are needed.
4. Identify sources of relevant market research data based on needs identified in Steps 1, 2 and 3.
5. Compile basic market research data, such as population, number of households, median cash income per household, percent of population at each income level, total retail sales and total retail sales by type of business.
6. Determine potential customer profile.
7. Establish market survey sample based on people who most closely match customer profile.
8. Select market survey method (personal interview, telephone interview, mail interview, focus group interview or group interview).
9. Design market survey questionnaire.
10. Test market survey questionnaire before using it.
11. Conduct market survey.
12. Process and analyze survey results to determine feasibility of starting business.
13. Prepare report of market survey results.
14. Make decision concerning starting the business.

KNOWLEDGE

Define market research.
Determine the need to conduct market research prior to starting a business.
Determine costs involved in conducting market research.
List types of market survey data needed, such as total population, number of households, median cash income per household, percent of population at each income level, total retail sales and total retail sales by type of business.
Analyze advantages and disadvantages of personal interview technique.
Analyze advantages and disadvantages of telephone interview technique.

KNOWLEDGE (Cont.)

Locate sources of relevant market data, such as trade associations, business publications and reports, marketing departments at local colleges or universities, area vocational center instructors, Chamber of Commerce, wholesalers and manufacturers, U.S. Department of Commerce field service office, state department of commerce, advertising space sales representatives and competitors.
Determine information to include in customer profile, such as the following: income level, age, sex, education, location, hobbies, skills, marital status, number of children, buying habits, special interests, physical handicaps, own or rent home, eating habits, recreational activities, age and type of car owned and occupation.
Use public library to locate basic market research data.
Analyze advantages and disadvantages of mail interview technique.
Analyze advantages and disadvantages of group interview technique.
Use good questioning techniques when developing questions for market survey.
Use resources, such as Small Business Administration Management Aids, "Feasibility Checklist for Starting a Small Business," to assist in market research efforts.
Determine method(s) for analyzing survey results.
Analyze research results.
Add, subtract, multiply and divide whole numbers using electric/electronic calculator.
Add, subtract, multiply and divide percents using electric/electronic calculator.
Construct charts or graphs manually to show results of marketing research.
Construct charts or graphs using microcomputer to show results of marketing research.
Use microcomputer to analyze research data.
Use electric/electronic calculator to analyze research data.
Locate and use parts of microcomputer.
Locate and use parts of printer.
Locate and use parts of electric/electronic calculator.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Input research data using touch method of keyboarding.

ATTITUDES

Base decision to begin business on solid market research.
Organize market research activities.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure by basing decision to start business on market research data.
Limit scope of business to provide best possible products/services to customers.
Keep food and beverages away from equipment and printed copies of research data to avoid damage to equipment, electrical shock to operator or having to reprint data.

SAFETY (Cont.)

Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) data frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Sources of basic market research data, such as Census of Business
Electric/electronic calculator
Microcomputer with printer
Software
Formatted diskettes
Pen or pencil
Pinfeed, fanfold or single-sheet paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
  Goal 1-A: Recognition, recall and summarization of material read.
  Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
  Goal 1-F: Integration of information from more than one text.
  Goal 2-C: Inferences from spoken messages and nonverbal cues.
  Goal 2-D: Distinction among different purposes in communication.
  Goal 2-E: Differing perspectives and points of view.
  Goal 2-F: Effective and appropriate responses.
  Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
  Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
  Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
  Goal 3-E: Use of standard written English conventions.
  Goal 4-A: Clear and expressive speaking.
  Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
  Goal 4-C: Development of ideas with appropriate support materials.
  Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
  Goal 4-E: Use of language for a variety of purposes.
  Goal 6-D: English grammar.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Mathematics:

Goal 1-A: Ability to read, write and name numbers in several different ways.
Goal 1-B: Ability to perform operations with numbers with and without a calculator.
Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
Goal 2-A: Interpretation of ratios.
Goal 2-B: Construction and solution of proportions.
Goal 2-C: Application of ratios and proportions to real-life situations.
Goal 2-D: Interpretations of percents in various settings.
Goal 2-E: Application of percents in real-life situations.
Goal 4-C: Translation of verbal descriptions into algebraic expressions, equations or inequalities and vice versa.
Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
Goal 4-E: Application of various techniques of graphing.
Goal 6-E: Interpretation of tables, graphs, charts, arrays, schedules, experiments and surveys reported in media sources.
Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.
Goal 6-H: Ability to design and conduct an experiment or survey using sampling.
Goal 7-A: Rounding numbers.
Goal 7-B: Estimation of present and future values from graphs or numerical information.
Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

Social Sciences:

Goal 1-F: Factors that have contributed to the economic development of the United States.
Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
Goal 1-M: Basic economic concepts that have traditionally shaped economic systems.
Goal 1-N: Traditional, market and command economic systems.
Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-B: Sources of information evaluated in terms of selective criteria.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
Goal 5-G: Ways to utilize the various levels of government.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Establishing a Small Business
TASK	Complete location feasibility study
PERFORMANCE STANDARD	
STEPS	This Task was combined with Task, "Select business location."
KNOWLEDGE	
ATTITUDES	
SAFETY	
EQUIPMENT AND MATERIALS	
SOURCE OF ANALYSIS	
ILLINOIS STATE GOALS FOR LEARNING	

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Establishing a Small Business
TASK	Select business location
PERFORMANCE STANDARD	The best possible location available for the business will be identified.

STEPS

1. Select city or town in which to locate business based on:
   a. Personal factors.
   b. Economic characteristics.
   c. Population trends and purchasing power.
   d. Competitive factors.
   e. Political attitude toward development.
2. Select areas in city or town for business based on:
   a. Market trends.
   b. Good customer base.
   c. Competition.
   d. Restrictive ordinances.
   e. Tax rates.
   f. Property values and trends.
   g. Labor conditions and availability.
3. Select specific site for business based on:
   a. Accessibility.
   b. Traffic volume and patterns.
   c. Nature of nearby businesses.
   d. Available buildings.
   e. Rent and terms.
   f. Mass transportation availability.
   g. Adequacy of parking.
   h. Adequacy of external lighting.
4. Select facility in which to locate business based on:
   a. Site history.
   b. Size and layout.
   c. Physical condition.
   d. Exterior appearance.
   e. Condition of lighting, plumbing and heating/air conditioning.
   f. Restrictive ordinances.
   g. Need for renovation or remodeling.

KNOWLEDGE

Determine the need to complete a site feasibility study.
Determine how important location is to customers for proposed business.
Determine how business location affects success or failure of business.
Determine why customers buy what they buy.
Determine and analyze factors involved in selection of city or town and the choice of an area in that town.
Evaluate attitudes of city planners toward business development.
Prioritize factors to evaluate when selecting specific business site.
Research statistical information on marketing community.
Determine population characteristics which would affect business location, such as culture, income, job, age and major employers.
Determine future market trends which would affect business location.
Evaluate competitors at potential business locations.
Determine zoning or closing ordinances that would negatively affect business.
Determine tax rates, property values and labor considerations which would adversely affect business.
Compare and analyze data from different sites.
Evaluate vehicular and pedestrian traffic patterns in potential business sites.
Determine and analyze factors involved in evaluating a facility.
Obtain preliminary property title policy to determine if any legal problems exist.
Establish criteria for building in which to locate proposed business.
Determine and analyze advantages and disadvantages of leasing vs. buying building.
Determine and analyze advantages and disadvantages of locating business in various types of shopping centers.
Determine types of neighboring businesses that would positively or negatively affect proposed business.
Analyze availability of parking facilities.
Use Small Business Administration Management Aids, "Factors in Considering a Shopping Center Location," "Store Location: 'Little Things' Mean a Lot" and "Using a Traffic Study to Select a Retail Site," to assist in site selection.
Use Small Business Administration Management Aids, "Feasibility Checklist for Starting a Small Business," to assist in completion of market analysis.

ATTITUDES

Organize the selection of a business location.
Show concern for handicapped customers by providing adequate parking.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure by selecting best location available for business.

EQUIPMENT AND MATERIALS

Reference information, such as current census data, local statistical information and local ordinances
Pen or pencil
Paper
Small Business Administration Management Aids
City zoning map and plats of specific property

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 6-E: Interpretation of tables, graphs, charts, arrays, schedules, experiments and surveys reported in media sources.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Determine legal form of organization

PERFORMANCE STANDARD A legal form of business organization will be selected for the proposed business.

STEPS

1. Prepare a list of the advantages and disadvantages of a sole proprietorship manually or using a microcomputer.
2. Prepare a list of the advantages and disadvantages of a general partnership manually or using a microcomputer.
3. Prepare a list of the advantages and disadvantages of a limited partnership manually or using a microcomputer.
4. Prepare a list of the advantages and disadvantages of a regular corporation manually or using a microcomputer.
5. Prepare a list of the advantages and disadvantages of an "S" corporation manually or using a microcomputer.
6. Prepare a list of the advantages and disadvantages of a franchise business manually or using a microcomputer.
7. Analyze advantages and disadvantages of each type of business organization based on the following:
    a. Nature and size of business.
    b. Capital needed to begin business.
    c. Type of managerial services desired.
    d. Tax laws.
    e. Financial liability of owner(s).
    f. Freedom from regulation.
    g. Continuity.
    h. Control.
    i. Management base.
8. Consult with attorney and/or accountant for assistance in analyzing types of business organizations.
9. Select the most appropriate form of business based on the above analysis.

KNOWLEDGE

Use terminology, such as sole proprietorship, general partnership, limited partnership, regular corporation, "S" corporation, franchise, limited liability, unlimited liability, net worth, liquid assets, assets and liabilities.

Identify possible legal forms of businesses.

Locate sources of advantages and disadvantages of legal forms of business.

Determine advantages and disadvantages of a sole proprietorship.

Determine advantages and disadvantages of a general partnership.

KNOWLEDGE (Cont.)

Determine advantages and disadvantages of a limited partnership.
Determine advantages and disadvantages of a regular corporation.
Determine advantages and disadvantages of an "S" corporation.
Determine advantages and disadvantages of a franchise.
Determine implications of cash flow versus income statement and taxes due as a result of each legal form of business.
Differentiate between limited and unlimited liability.
Use microcomputer to prepare lists of advantages and disadvantages of each type of business ownership.
Locate and use parts of microcomputer.
Locate and use parts of printer.
Determine importance of obtaining legal and financial advice prior to establishing legal form of business.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.

ATTITUDES

Obtain financial and legal advice prior to establishing legal form of business.
Consider personal and family goals when choosing form of business.
Consider family financial needs when choosing form of business.
In addition, refer to Employability Skills List.

SAFETY

Select the most appropriate form of business to reduce personal risk and maximize personal gain.
Consult with an attorney and/or accountant prior to selecting type of business organization.
Keep food and beverages away from equipment to avoid damage to equipment or electrical shock to operator.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) lists frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

References which identify advantages and disadvantages of the legal forms of business organizations, such as Small Business Administration Management Aids, "Incorporating a Small Business"
Pen or pencil
Microcomputer with printer
Software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

**ILLINOIS
STATE GOALS
FOR
LEARNING**

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 6-E: Interpretation of tables, graphs, charts, arrays, schedules, experiments and surveys reported in media sources.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Prepare loan application package

PERFORMANCE STANDARD Loan proposal will be tailored to one specific lender, will contain accurate data and will be typed or printed.

STEPS

1. Determine amount of money needed to start business by identifying start-up costs including:
   a. Fixed assets.
   b. Prepaid items and deposits.
   c. Opening inventory.
   d. Working capital.
2. Determine amount of money needed to cover personal expenses until business is operational.
3. Prepare a projected cash flow statement (pro forma) which shows projected income and expenses for a year.
4. Investigate potential sources of capital or lenders.
5. Prepare information to include in loan proposal, such as:
   a. Brief summary of what business is, products or services to be sold and general types of competition.
   b. Brief history of owner(s).
   c. Explanation of amount of money needed, preferred terms, repayment preference, collateral available and other information relevant to specific request for funds.
   d. Financial statements (balance sheet, personal earnings history, projected income statement and projected break-even analysis for business for three years).
   e. Credit, personal and business references.
6. Input on microcomputer or type the following types of information for the loan proposal:
   a. Name of financial institution or lender, business name and date of proposal.
   b. Loan amount and generally how funds will be used.
   c. Description of proposed business.
   d. Detailed breakdown of how funds will be used.
   e. Supporting information to show how funds will be used.
   f. Projected business income statement for a year.
   g. Projected business balance sheet after one year.
   h. Other source(s) of funds invested in business.
   i. Personal financial statement(s) of owner(s).
   j. Credit references, personal references and present and past business associates.
   k. Personal background of applicant(s).
   l. Proposed repayment of loan and interest.

STEPS
(Cont.)

7. Save loan proposal if using microcomputer.
8. Print loan proposal if using microcomputer.
9. Proofread printed or typed copy of loan proposal to ensure accuracy of information.
10. Sign loan proposal.
11. Place loan proposal in binder or folder for attractive presentation to prospective lender.

KNOWLEDGE

Use terminology, such as income statement, cash flow projection, pro forma, assets, liabilities, net worth, break-even point, equity funds, debt funds, undercapitalized, creation of wealth and working capital.
Identify potential lenders or business investors.
Analyze differences between equity funds and debt funds.
Determine need to prepare cash flow projection (pro forma).
Determine items to include in a cash flow projection (pro forma).
Analyze any weaknesses in financial projections.
Determine cost of equipment, materials and supplies needed to start business.
Add, subtract, multiply and divide whole numbers using electric/electronic calculator.
Calculate total amount needed to pay for business start-up costs using electric/electronic calculator.
Estimate day-to-day operating expenses.
Determine information to include in loan proposal.
Use microcomputer or typewriter to prepare loan proposal.
Locate and use parts of microcomputer or typewriter.
Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Locate and use parts of electric/electronic calculator.
Proofread printed or typed copy of loan proposal to ensure its accuracy.
Determine what it means for a business to be undercapitalized.
Recognize the role planning plays in profitable businesses.
Predict business profitability.
Prepare business and personal financial statements, such as income statement and balance sheet.
Apply basic accounting principles.
Analyze various loan repayment terms.
Select most appropriate method of repaying loan.
Write concisely and clearly.

ATTITUDES

Plan carefully for financial needs of business prior to starting business.
Specify realistic amounts when determining cost of establishing business.
Prepare loan proposal honestly.
Prepare loan proposal neatly and accurately.
In addition, refer to Employability Skills List.

SAFETY

Plan for unexpected costs that arise when starting a business.
Plan for dramatic seasonal fluctuations in earnings.
Keep food and beverages away from microcomputer and printed loan proposal to avoid damage to equipment, electrical shock to operator or having to reprint loan proposal.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) loan proposal information frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Pen or pencil
Microcomputer with printer
Software
Formatted diskettes
Typewriter
Pinfeed, fanfold or single-sheet paper
Correction materials, such as correction tape, correction fluid or eraser
Electric/electronic calculator

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-B: Ability to develop and maintain a focus with a clear thesis, a main idea, theme or unifying event.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 3-F: Ability to revise, edit and proofread.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)	Social Sciences: Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Obtain venture capital

PERFORMANCE STANDARD Loan proposal(s) will be presented to possible lender(s), and adequate financing will be obtained to start the business.

STEPS

1. Select type(s) of financing to seek:
   a. Debt financing.
   b. Equity financing.
   c. Convertible debentures.
2. Prioritize possible source(s) of financing:
   a. Commercial banks.
   b. Savings and loan associations.
   c. Credit unions.
   d. Loan companies.
   e. Small business investment companies.
   f. Community development companies.
   g. Insurance companies.
   h. Suppliers or vendors.
   i. Leasing companies.
   j. Business brokers and investors.
   k. Franchisors.
   l. Small Business Administration.
   m. Equipment manufacturers or distributors.
   n. Family members.
   o. Friends.
3. Make appointment to present loan proposal.
4. Present loan proposal to potential lender(s).
5. Determine when decision on loan proposal will be made and who will make the decision.
6. Contact lender to obtain response to loan proposal.
7. Obtain needed financing if loan proposal is approved.
8. Repeat Steps 3-8 until loan is approved, if it is not approved by first lender.

KNOWLEDGE

Use financial terminology, such as short-term loan, long-term loan, open line of credit, promissory note, maker, payee, secured loan or collateral loan, unsecured loan, cosigner, prime rate, discounted loan, maturity date, trade credit and capital.

Determine differences between debt financing and equity financing.

Weigh the risks involved with each type of financing.

Determine possible sources of financing.

KNOWLEDGE (Cont.)

Weigh the advantages and disadvantages of each source of financing.
Determine why friends and family members are not always the best sources of financing.
Follow appropriate procedures to prepare loan proposal.
Practice loan presentation.
Determine how long it will take to obtain loan approval.
Identify who will make decision on loan, such as loan officer or loan committee.
Determine cost(s) of borrowing funds.

ATTITUDES

Arrive on time for appointment to present loan proposal.
Establish positive relationship with banker or loan officer where personal business is conducted.
Keep trying if loan is turned down by lender(s).
Display confidence and professionalism when presenting loan proposal to potential lenders.
Accept reluctance of friends and family to loan money.
Accept the responsibility of repaying loan based on agreed-upon terms.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of not being able to repay loan by carefully planning the business.
Reduce risk of being turned down for loan by establishing relationship with banker or loan officer and preparing well-thought-out loan proposal.

EQUIPMENT AND MATERIALS

Typed or printed loan proposal
List of potential financing sources

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Follow steps to file ownership for business

PERFORMANCE STANDARD Ownership for business will be legally filed with appropriate local, county and/or state government agencies.

STEPS

1. Contact organizations, such as Small Business Administration, Chamber of Commerce and trade associations, to identify local, county and/or state regulatory agencies which affect chosen legal form of business.
2. Contact local, county and state government offices to determine what must be done to file ownership for chosen legal form of business.
3. Obtain legal assistance to prepare documents, such as:
   a. Articles of copartnership.
   b. Articles of incorporation (charter).
4. File the following with local, county and state government offices, as needed:
   a. Assumed name.
   b. Taxes.
   c. License fees.
   d. Articles of copartnership.
   e. Articles of incorporation (charter).

KNOWLEDGE

Use terminology, such as articles of copartnership, articles of incorporation, charter and assumed name.
Determine local, county and/or state government offices to contact to file ownership for business.
Determine need to seek the assistance of an attorney to prepare documents and assist in their filing.
Determine time lines which must be met when filing ownership with appropriate entities.
Determine documents to be prepared to file for business ownership.
Determine criteria and procedures for filing assumed name for business.
Determine information to include in articles of copartnership and articles of incorporation.
Establish specifics of partnership and corporation business ownership.

ATTITUDES

Accept need to keep business operation legitimate.
In addition, refer to Employability Skills List.

SAFETY	Legitimatize business operation by filing appropriate ownership documents. Use an attorney experienced in business start-up activities to prepare legal documents and to assist with all filing activities.
EQUIPMENT AND MATERIALS	List of small business service organizations List of local, county and/or state government agencies Forms and procedures for filing needed documents
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-G: Ways to utilize the various levels of government.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Comply with government regulations

PERFORMANCE STANDARD All government licensing, permit, building and zoning requirements will be followed when establishing the business.

STEPS

1. Contact organizations, such as the Small Business Administration, Chamber of Commerce and trade associations, to identify local, county and/or state agencies which regulate chosen business.
2. Contact identified local, county and/or state regulatory agencies to determine licensing and permit needs.
3. Complete forms to obtain necessary licenses and permits, such as:
   a. Business license.
   b. Construction permit.
   c. Occupancy permit.
   d. Fire inspection certificate.
   e. Health department license or certificate.
   f. Food and beverage license.
   g. Motor vehicle license.
   h. Occupational Safety and Health Administration (OSHA) inspection certificate.
4. Pay fees associated with licenses and permits.
5. Obtain employer identification number from the Internal Revenue Service (IRS).
6. Obtain tax identification number from the Illinois Department of Revenue.
7. Obtain assistance from attorney to file for necessary patents, copyrights or zoning variances.
8. Identify and comply with local regulations for building, zoning, parking, landscaping and providing access for handicapped customers.

KNOWLEDGE

Determine local, county and/or state regulatory agencies responsible for issuing needed licenses and permits.

Determine licenses, permits and zoning requirements for chosen business.

Complete necessary forms to apply for an employer identification number from the IRS.

Complete necessary forms to apply for a tax identification number from the Illinois Department of Revenue.

Determine fees to be paid to obtain needed licenses and permits.

KNOWLEDGE (Cont.)

Determine patent or copyright requirements for proposed business product.
Determine local and state tax reporting procedures for taxes, such as income, sales, property and unemployment.
Determine any local parking requirements and/or restrictions.
Determine any local landscaping requirements and/or restrictions.
Determine any local building requirements and/or restrictions.
Determine special government requirements for handicapped customer access.
Write legibly when completing forms.

ATTITUDES

Show concern for handicapped customers by meeting government requirements for access.
Accept need to keep business operation legitimate.
In addition, refer to Employability Skills List.

SAFETY

Legitimatize business operation by complying with all government regulations.
Use competent attorney to prepare legal documents.

EQUIPMENT AND MATERIALS

List of small business service organizations
List of local, county and/or state regulatory agencies
Forms for obtaining necessary licenses and permits
IRS employer identification number application
State tax identification number application

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Social Sciences:
    Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
    Goal 5-G: Ways to utilize the various levels of government.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Obtain insurance, such as fire, liability and worker's compensation

PERFORMANCE STANDARD Necessary insurance will be identified and obtained prior to beginning business operation.

STEPS

1. Determine risks that would be most damaging to the business.
2. Determine types of insurance which would cover identified risks.
3. Locate insurance agents who provide the kind(s) of insurance needed.
4. Choose insurance agent(s) based on the following:
    a. Business insurance expertise to match business needs.
    b. Reputation in the community or recommendation from other small business owners.
    c. Personal interviews of agents.
    d. Willingness to spend time evaluating insurance needs.
    e. Achievement of Chartered Property and Casualty Underwriter (CPCU) and Chartered Life Underwriter (CLU) designations.
5. Choose insurance company based on the following:
    a. Specialized types of insurance needed.
    b. Good reputation for service.
    c. Financial stability.
    d. Competitive prices.
6. Select multiple-line policy to cover most liability insurance needs.
7. Add appropriate separate policies or endorsements to cover needs not included in multiple-line policy.
8. Select health insurance or Health Maintenance Organization (HMO) policies for employees to cover basic medical and hospitalization costs, major medical costs and/or disability income.
9. Select group life insurance for employees.
10. Select group dental insurance for employees.
11. Obtain worker's compensation coverage.
12. Select personal life, health, dental and/or disability for owner(s).
13. Select appropriate insurance for at-home business.

KNOWLEDGE

Use terminology, such as pure risk, deductibles, liability insurance, self-insurance, CPCU, CLU, credit life, multiple-line policies, all-risk policy, endorsements, replacement cost, actual value, business interruption insurance, professional liability insurance, motor vehicle insurance, credit insurance, title insurance, aviation insurance, cast insurance, crop insurance, bonds, term life insurance, whole life insurance, cottage industries, fidelity bonds, performance or surety bonds, marine and inland marine insurance, completed operations insurance, product liability, comprehensive general liability, forgery insurance, policyholder, policy, insured, peril, premium and coinsurance.

Determine types of insurance needed by business, such as property and liability insurance, employee plans, worker's compensation, life and health insurance for owners and partners and insurance for at-home businesses.

Inventory business property (buildings, furniture, equipment, inventory and vehicles) and identify value in terms of replacement cost.

List disasters or risks to which business property is exposed, such as fire, explosion, windstorm, flood, earthquake, theft, burglary, vandalism and riot.

List types of damage to others for which business could be held financially responsible.

Determine need for business interruption insurance.

Investigate need for insurance coverage for employees, such as health, life, dental, disability and worker's compensation.

Investigate need for insurance coverage for owners or partners.

Investigate types of insurance needed by at-home businesses.

Use telephone directory to identify potential insurance agents.

Determine if self-insurance is an option for business.

ATTITUDES

Follow ethical business practices by purchasing enough insurance to cover large losses but not carrying excess insurance to make a profit on claims.

Care for needs of employees by providing insurance benefits.

Care for personal and family needs of owners or partners by providing insurance benefits.

In addition, refer to Employability Skills List.

SAFETY

Reduce risk of serious personal or business financial loss by maintaining necessary insurance.

Look for ways to make business safer to reduce need for insurance.

Obtain insurance policies with liability limits that are high enough to cover potential lawsuit awards.

EQUIPMENT AND MATERIALS

Paper
Pen or pencil
Telephone directory

SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Social Sciences: Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Choose kind of business to establish

PERFORMANCE STANDARD The kind of business will be chosen in a systematic manner to best meet personal and business goals.

STEPS

1. Determine personal suitability for small business ownership by:
    a. Listing traits of successful entrepreneurs.
    b. Listing personal traits.
    c. Comparing personal traits with those of successful entrepreneurs.
2. Prepare personal inventory to identify:
    a. Skills.
    b. Experience.
    c. Most satisfying accomplishments.
    d. Hobbies.
    e. Interests.
    f. Knowledge or expertise acquired from schools, seminars and special training.
3. Use information from Steps 1 and 2 to assess personal strengths and weaknesses.
4. List personal needs which must be fulfilled by the business, such as:
    a. Personal satisfaction.
    b. Creative expression.
    c. Family needs.
    d. Financial needs.
5. Consider the risks of self-employment, such as financial, psychological, social, career and physical.
6. List possible business ideas, such as:
    a. Services needed by others.
    b. Entertainment.
    c. Marketing products for others.
    d. Repair services.
    e. New inventions.
    f. Franchise opportunities.
    g. Extension of hobbies.
    h. Home businesses.
7. List businesses within identified categories which are of interest.

STEPS
(Cont.)

8. Rate each potential business based on information gathered in Steps 3 and 4 or by using an established rating system, such as those available from the American Institute for Small Business.
9. List the five business possibilities that rated highest.
10. Complete the following for each business possibility:
    a. Talk to others in the same business or similar businesses.
    b. Review articles available at public library or from trade associations on the success and failure rates of this type of business.
    c. Seek advice from professionals, such as an attorney, certified public accountant, marketing consultant and/or banker.
    d. Attend trade shows.
    e. Discuss possibilities with family, friends and associates.
11. Make final decision personally on type of business to start.

KNOWLEDGE

Use checklists, such as Specific Personal Considerations and General Personal Considerations from Small Business Administration Management Aids, "Feasibility Checklist for Starting a Small Business," to determine personal suitability for small business ownership.
Identify most common types of small businesses--service businesses, retail businesses and light manufacturing.
List traits of successful entrepreneurs.
List personal traits.
Match personal traits with those of successful entrepreneurs.
Determine personal reasons for going into business.
Determine personal qualities, interests and knowledge to include in personal inventory.
Determine what personal needs business must meet.
List business possibilities using sources, such as telephone directory, Small Business Administration, business library, Thomas Register or other business directories, entrepreneurial magazines, business people and personal ideas.
Use rating system, such as the Criteria Rating System identified in How to Set Up Your Own Small Business to rate potential businesses.
Locate other business people in similar businesses.
Use the public library to locate information on specific types of businesses.
Contact competent professionals, such as an attorney, certified public accountant, marketing consultant and banker.
Discuss business opportunities with friends, family members and associates.

ATTITUDES	Organize process of selecting kind of business to establish. Prepare to work hard and for long hours when establishing a business. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of business failure by using a systematic approach to determine type of business to establish.
EQUIPMENT AND MATERIALS	Telephone directory Trade or business directories Pen or pencil Paper How to Set Up Your Own Small Business by the American Institute of Small Business "Feasibility Checklist for Starting a Small Business" by the Small Business Administration Entrepreneurial magazines
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 4-A: Clear and expressive speaking. Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Select business opportunity

PERFORMANCE STANDARD Business opportunity will be selected in a systematic manner to best meet personal and business goals.

STEPS

1. Determine the three basic options for establishing a small business:
   a. Acquire a franchise business.
   b. Purchase an existing business.
   c. Establish a new business.
2. List the advantages and disadvantages for each type of business opportunity.
3. Look for specific business opportunities by:
   a. Contacting business professionals to determine available business opportunities.
   b. Researching directories on franchise opportunities available at the public library or Small Business Administration office.
   c. Reviewing "Business Opportunities" section of the classified ads and display ads in local or business newspapers.
   d. Reviewing ads in magazines.
   e. Attending trade shows.
4. Investigate franchise opportunities.
5. Investigate opportunities for purchasing existing business.
6. Investigate opportunities for starting business from scratch.
7. Rate business opportunities based on personal and business goals established in Task, "Choose kind of business to establish." Use rating process from that Task.
8. Select business opportunity that best meets personal and business goals.

KNOWLEDGE

Determine types of business opportunities--acquire franchise, purchase existing business or develop new business.

Determine types of franchises--conventional, distributorship, licensed, manufacturing and service.

Locate business professionals, such as banker, attorney, investment broker, marketing consultant or other entrepreneurs to assist in identifying business opportunities available.

Use directories available from the Small Business Administration or public libraries to identify franchise opportunities.

KNOWLEDGE (Cont.)	Use newspapers and magazines to identify possible business opportunities. List advantages and disadvantages of acquiring a franchise. List advantages and disadvantages of buying an existing business. List advantages and disadvantages of starting business from scratch. Determine difference between capital intensive and labor intensive business. Identify personal and business goals. Assess success, reputation and image of franchise opportunities. Consult with Better Business Bureau to determine existing business or franchise reputation. Determine financial investment needed for each business opportunity and methods of obtaining financing. Estimate tangible and intangible value of business being sold. Investigate reputation and track record of existing business. Investigate items, such as changes in nature of business, changes in neighborhood, business liabilities, existing promises or contracts and potential lawsuits for existing businesses. Determine the number and kind of business failures in area where business is located or being established. Analyze steps to be taken to establish new business.
ATTITUDES	Organize process of selecting business opportunity. Prepare to work hard and for long hours when establishing business. In addition, refer to Employability Skills List.
SAFETY	Consult with attorney prior to signing any contract. Reduce risk of business failure by using a systematic approach to selecting business opportunity.
EQUIPMENT AND MATERIALS	Personal and business goals from Task, "Choose kind of business to establish" Paper Pen or pencil Local or business newspapers Magazines Business or trade association directories
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:

- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Establishing a Small Business

TASK Select business name

PERFORMANCE STANDARD Select a simple, appropriate, descriptive business name which is not registered for another business with the Secretary of State or county clerk.

STEPS

1. Review the following guidelines prior to selecting a name for the business:
    a. Start name with letter other than "A" as many business names begin with that letter..
    b. Avoid using an initial followed by a name as it is difficult to locate in the telephone directory.
    c. Avoid apostrophes at the beginning of the business name.
    d. Keep name clear and classic rather than trendy or clever unless business would be enhanced by a trendy or clever name.
    e. Consider using subhead when starting out.
    f. Use ". . . By . . ." only if business is to be small and exclusive.
    g. Consider using geographic names, such as Illinois or county or city name, but recognize that they are used by numerous businesses.
    h. Use "Co." only if additional partners are not listed in name.
    i. Designate that business is corporation, if needed.
    j. Keep name simple, appropriate and descriptive.
2. List potential business names that meet these guidelines.
3. Select most appropriate name from list.
4. Check to see that chosen name is not used by another business by:
    a. Checking in the telephone directory.
    b. Calling directory assistance for new business names listed after telephone directory was published.
    c. Looking for businesses with similar names in the area.
    d. Calling the offices of the Secretary of State and county clerk to identify established businesses with the same or similar names.
5. Discuss selected name with family, friends, business professionals and potential customers to determine its appropriateness.

STEPS (Cont.)

6. Check with the phone company to ensure that the business name will be listed in the directory exactly as selected.
7. Register business name with the Secretary of State, or file for assumed name registration with the county clerk.

KNOWLEDGE

List potential business names that are appropriate and legal.
Choose most appropriate name for business from list.
Use telephone directory to make sure the name selected is not the same as or very similar to other businesses.
Register business name with the Secretary of State, or file for assumed name registration with the county clerk.
Complete forms needed to register business name.
Write legibly when completing forms to register business name.

ATTITUDES

Use common sense when selecting business name.
In addition, refer to Employability Skills List.

SAFETY

Keep business name legitimate to reduce risk of lawsuits and loss of profits.

EQUIPMENT AND MATERIALS

Paper
Pen or pencil
Telephone directory

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-G: Ways to utilize the various levels of government.

TASK ANALYSIS

FOR

BUSINESS, MARKETING

AND MANAGEMENT OCCUPATIONS

CLUSTER: **BUSINESS OWNERSHIP/MANAGEMENT**

OCCUPATION: **SMALL BUSINESS OWNER/OPERATOR**

Duty Area: Planning and Budgeting

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Prepare business plan

PERFORMANCE STANDARD Business plan will be dynamic, measurable, realistic and attainable; and contents will be communicated to appropriate personnel.

STEPS

1. Obtain and review copy of previously prepared loan proposal.
2. Prepare business summary (why business works, how it fits into marketplace and future of business).
3. Develop complete description of industry and product or service being provided by business.
4. Prepare description of the market based on market research (current and future market trends, strengths and weaknesses of competition and customer makeup).
5. Outline marketing strategy which includes how product or service is sold, pricing strategy, estimated sales for three years, market share for three years, advertising and public relations plans and service and warranty policies.
6. Outline production plan, if needed.
7. Describe organization structure of business (include an organizational chart, number and qualifications of personnel and future personnel additions).
8. Include current business financial statements, and show how existing figures will increase.
9. Prepare projected financial statements.
10. Input in microcomputer or type prepared business plan (or have someone input or type).
11. Save business plan if using microcomputer.
12. Print business plan if using microcomputer.
13. Proofread business plan.
14. Edit business plan or correct any errors.
15. Retype or print finalized business plan.
16. Prepare copies of business plan for appropriate personnel using photocopier or microcomputer printer.
17. Disseminate copies of business plan to appropriate personnel.
18. Discuss contents of business plan with appropriate personnel.
19. Assess progress of business and personnel toward goals periodically.
20. Adjust or change goals and strategies as needed.

KNOWLEDGE

Determine need to prepare business plan for small business.
Complete market research.
Build business plan on information contained in loan proposal.
Analyze differences between business plan and loan proposal.
List advantages and benefits of products or services provided by business.
Develop pricing strategy for product or service.
Forecast sales for next three years.
Estimate market share for the next three years.
Add, subtract, multiply and divide whole numbers using electric/electronic calculator.
Prepare advertising and public relations plan for business.
Establish service and warranty policies for business.
Develop production plan which includes how, where and by whom products will be produced; type of raw material and its availability; anticipated rate of production and type of labor to be used.
Set up organization chart for business.
Prepare business financial statements, such as balance sheet and income statement.
Be totally familiar with financial details of business.
Determine how each figure on each financial statement was derived.
Use microcomputer or typewriter to prepare business plan.
Locate and use parts of microcomputer.
Locate and use parts of typewriter.
Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Locate and use parts of photocopier.
Proofread business plan.

ATTITUDES

Take an organized approach to business operation.
Recognize the importance of a complete business plan to the success of a small business.
Recognize the need to understand how financial statements are prepared.
Prepare business plan accurately.
Recognize the need for key personnel to be aware of and understand business plan.
Make business plan dynamic, reasonable and attainable.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure through the development of a complete business plan.
Keep food and beverages away from computer or typewriter and printed copies of business plan to avoid damage to equipment, electrical shock to operator or having to reprint business plan.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.

SAFETY (Cont.)

Store (save) marketing plan information frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Loan proposal
Marketing research
Business financial statements
Microcomputer with printer or typewriter
Software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper
Photocopier
Pen or pencil
Electric/electronic calculator

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-F: Integration of information from more than one text.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-B: Ability to develop and maintain a focus with a clear thesis, a main idea, theme or unifying event.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 3-F: Ability to revise, edit and proofread.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Planning and Budgeting
TASK	Plan goals and objectives for business
PERFORMANCE STANDARD	Goals and objectives for business must be measurable, realistic, attainable and communicated to appropriate personnel.

STEPS

1. Design or obtain planning worksheet containing the following sections:
   a. Goals.
   b. Objectives.
   c. Priority.
   d. Action (tasks).
   e. Due date.
   f. Responsible person.
   g. Result.
2. Establish broad business goals.
3. Brainstorm and list a series of objectives to meet each goal.
4. Prioritize list of objectives.
5. Establish measurable objectives.
6. Prepare copies of goals and objectives for appropriate personnel using photocopier.
7. Distribute goals and objectives to appropriate personnel.
8. Discuss pertinent goals and objectives with employees.

KNOWLEDGE

Use terminology, such as goals, objectives, short-term goals, long-term goals, top-down planning and bottom-up planning.
Determine need to establish goals and objectives for business.
Determine how business goals and objectives differ.
Determine differences between short-term and long-term goals.
Determine sections to include on planning worksheet.
Develop planning worksheet.
Determine any limitations that should be considered when establishing goals and objectives (money, people, time and equipment).
Use tools, such as planning worksheet, to chart goals and objectives.
Make goals and objectives flexible and realistic.
Recognize that planning is a problem-solving process.
Follow systematic procedure for problem solving.
Analyze advantages and disadvantages of top-down and bottom-up planning.

KNOWLEDGE (Cont.)

Locate and use parts of photocopier.
Write legibly when preparing planning worksheet.
Write clearly when developing goals and objectives for business.

ATTITUDES

Establish realistic goals and objectives for business.
Change goals and objectives as needed.
Recognize importance of involving key personnel when establishing goals and objectives.
Recognize importance of making all employees familiar with pertinent goals and objectives.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure through effective planning.
Keep food and beverages away from photocopier and copies of business goals and objectives to avoid damage to equipment, electrical shock to operator or having to recopy business goals and objectives.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Planning worksheets
Pen or pencil
Photocopier

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-B: Sources of information evaluated in terms of selective criteria.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-H: Roles of individuals and/or groups in effecting change.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Establish and diagram the business organizational structure

PERFORMANCE STANDARD Organization chart will show lines of authority and responsibility and will be copied and distributed to all employees.

STEPS

1. Obtain and study sample organizational charts to gain ideas on possible business organizational structures.
2. Divide total work to be done in business into units based on type and amount of work to be done.
3. Assign responsibility for each work unit to appropriate employee.
4. Delegate authority for work unit operation to designated employee.
5. Draw organization chart.
6. Prepare copies of organization chart using photocopier.
7. Distribute organization chart to employees.
8. Explain organization chart to employees.

KNOWLEDGE

Determine need to prepare organization chart for a small business.
Determine importance of organization chart in small businesses.
Determine all work to be completed in business.
Determine differences between line organization and line-and-staff organization.
Use broken lines on organization chart to show employees whose responsibility is to give specialized assistance and advice.
Prepare organization chart.
Locate and use parts of photocopier.

ATTITUDES

Recognize importance of having an organization chart in a small business.
Recognize need of employees to understand how business is organized and where authority lies.
In addition, refer to Employability Skills List.

SAFETY

Reduce business organizational problems by providing employees with organization chart that correctly shows lines of authority and responsibility.

Keep food and beverages away from photocopier and copies of organization chart to avoid damage to equipment, electrical shock to operator or having to recopy organization chart.

Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Sample organization charts
Paper
Pen or pencil
Ruler, straightedge or flowcharting template
Photocopier

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Establish operating policies and procedures

PERFORMANCE STANDARD Policies and procedures will be written and communicated to employees and customers, as needed.

STEPS

1. Determine operating policies to be established for business, such as the following:
    a. Merchandise policy.
    b. Service policy.
    c. Credit policy.
    d. Personnel policy.
    e. Smoking policy.
    f. Food and pet policy.
    g. Hours policy.
    h. Warranties policy.
    i. Pricing policy.
    j. Return and exchange policy.
    k. Safety policy.
2. Obtain and review sample policies from similar businesses, if available.
3. Write each operating policy.
4. Write step-by-step procedures for each policy.
5. Prepare copies of all policies and procedures for each employee using photocopier.
6. Distribute a copy of policies and procedures to each employee.
7. Discuss policies and procedures with employees.
8. Determine policies to post within view of customers.
9. Prepare and post signs indicating policies.
10. Discuss policies and procedures with customers, as needed.

KNOWLEDGE

Use terminology, such as policy and procedure.
Determine need to establish business operating policies and procedures.
Analyze advantages and disadvantages of different types of policies to determine which are needed for business.
Use clear and concise wording when writing operational policies and procedures.
Type, write legibly or prepare on microcomputer copies of policies and procedures for employees.
Locate and use parts of microcomputer or typewriter.

KNOWLEDGE (Cont.)

Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Locate and use parts of photocopier.
Determine need to post policies within view of customers.
Prepare signs indicating policies by hand or using sign press.

ATTITUDES

Recognize the importance of establishing written policies and procedures for business operation.
Recognize the need to communicate policies and procedures to employees and customers.
Recognize the need to be flexible when applying policies and procedures.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of dissatisfied customers by posting business operating policies.
Consult with attorney to determine legal responsibility of any posted policies.
Keep food and beverages away from equipment and printed policies and procedures to avoid damage to equipment, electrical shock to operator or having to reprint policies and procedures.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) policy and procedure information frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Sample policies and procedures from similar businesses
Pen or pencil
Typewriter or microcomputer with printer
Software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper
Photocopier
Poster board
Markers
Rub-off letters
Ruler or straightedge
Sign press

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Develop action plans to meet specific goals

PERFORMANCE STANDARD Action plans will be measurable, realistic and attainable; and contents will be communicated to appropriate personnel.

STEPS

1. Obtain planning worksheets containing goals and objectives for business; or list goals and objectives on planning worksheets, if not already completed.
2. Involve appropriate personnel in the development of action plan.
3. List actions that must be taken, tasks that must be performed and/or obstacles that must be overcome to accomplish each objective.
4. Sequence actions or tasks on planning worksheet.
5. Establish due date for each action or task, and write it on planning worksheet.
6. Assign responsibility for each action or task, and place name of responsible person on planning worksheet.
7. Prioritize each action or task, and list priority on planning worksheet.
8. Prepare copies of action plan for appropriate personnel using photocopier.
9. Discuss actions and their priorities with appropriate personnel.

KNOWLEDGE

Use terminology, such as goals, objectives, top-down planning, bottom-up planning, actions and tasks.
Determine need to establish actions or tasks to meet objectives.
Determine appropriate personnel to involve in the development of action plan.
List all possible actions to be taken to accomplish each objective.
Determine any limitations which should be considered when establishing action plan.
Determine potential problems relative to the completion of each action or task.
Prioritize actions.
Determine appropriate person to be responsible for accomplishment of each action.

KNOWLEDGE (Cont.)	Develop backup plans. Write legibly when preparing action plan. Use tools, such as planning worksheet, to identify actions or tasks, responsible employees, due dates and priorities. Make action plan flexible and realistic. Recognize that planning is a problem-solving process. Follow systematic procedures for problem solving. Analyze advantages and disadvantages of top-down and bottom-up planning. Locate and use parts of photocopier.
ATTITUDES	Develop realistic action plan. Change action plan as needed. Recognize importance of involving appropriate personnel in establishing action plan. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of business failure through effective planning. Keep food and beverages away from photocopier and copies of action plan to avoid damage to equipment, electrical shock to operator or having to recopy action plan. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copies of business goals and objectives Planning worksheets Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-E: Use of standard written English conventions. Goal 4-A: Clear and expressive speaking. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Develop business/marketing plan

PERFORMANCE STANDARD Business/marketing plan will contain marketing goals, strategies for achieving goals and a means to measure achievement of goals. It will be written and discussed with appropriate personnel.

STEPS

1. Review overall business plan to identify already established marketing goals.
2. Establish specific, reasonable marketing goals for business in areas, such as:
   a. Profitability.
   b. Sales volume.
   c. Sales growth.
   d. Market share.
3. Establish strategies (activities) for achieving goals.
4. Establish completion schedule for marketing plan which includes:
   a. When activities are to begin.
   b. When activities are to be completed.
5. Write marketing plan, based on Steps 2-4, which includes the following sections:
   a. Market description.
   b. Marketing objectives.
   c. Competition.
   d. Environment.
   e. Marketing mix.
   f. Marketing budget.
6. Input on microcomputer or type marketing plan.
7. Save marketing plan if using microcomputer.
8. Print marketing plan if using microcomputer.
9. Proofread marketing plan, and make necessary corrections.
10. Prepare copies of marketing plan for appropriate personnel using photocopier or microcomputer printer.
11. Disseminate copies of marketing plan to appropriate personnel.
12. Discuss contents of marketing plan with appropriate personnel.
13. Monitor progress of business and personnel toward goals periodically.
14. Adjust or change goals and strategies, as needed.

KNOWLEDGE

Use terminology, such as marketing, marketing plan, short-range and long-range marketing plans, goals, target market, marketing mix, sales volume, sales growth, market share, pricing, distribution, promotion, product and profitability.
Determine importance of developing and implementing a marketing plan for a small business.
Determine appropriate personnel to involve in the development of the marketing plan.
Determine potential marketing goals for business.
Determine potential activities to be completed to meet marketing goals.
Prioritize marketing goals and activities.
Determine target dates for the achievement of marketing goals and activities.
Determine appropriate person to be responsible for accomplishment of each activity.
Use microcomputer or typewriter to prepare marketing plan.
Use photocopier to prepare copies of marketing plan.
Use microcomputer printer to prepare copies of marketing plan.
Determine personnel who need to be aware of and held responsible for achievement of goals and activities in marketing plan.
Analyze results of periodic assessment to identify changes which need to be made in marketing plan.
Locate and use parts of microcomputer or typewriter.
Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Locate and use parts of photocopier.

ATTITUDES

Take an organized approach to business operation.
Recognize the need for key personnel to be involved in the development of marketing goals and activities.
Recognize the need for all personnel to be aware of and understand marketing goals and activities.
Establish reasonable and attainable marketing goals.
Change goals as needed.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure through effective planning.
Keep food and beverages away from equipment and copies of marketing plan to avoid damage to equipment, electrical shock to operator or having to recopy marketing plan.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) marketing plan information frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Established business plan
Pen or pencil
Microcomputer with printer or typewriter
Software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper
Photocopier

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-E: Use of standard written English conventions.
- Goal 3-F: Ability to revise, edit and proofread.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.

Social Sciences:
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Develop sales forecast

PERFORMANCE STANDARD Sales for business will be forecast for each month and charted for one year.

STEPS

1. Obtain and review records of actual sales by month for business for previous year.
2. Determine current market share for business.
3. Estimate market potential for products or services for county or market area for next year.
4. Establish desired business market share for next year.
5. Calculate estimated annual sales based on desired market share and market potential.
6. Establish sales figures by month based on the following:
    a. Sales fluctuation periods.
    b. Inflation.
    c. General business conditions.
    d. Changes in competition.
    e. Trends in customer demand.
    f. Changes in business operations or policies.
    g. Promotional strategies.
7. Prepare monthly sales forecast chart that includes:
    a. Actual sales by month for previous year.
    b. Projected sales by month for current year.
    c. Actual sales by month for current year.
8. Review sales forecast chart each month.
9. Revise sales forecast based on monthly review.

KNOWLEDGE

Use terminology, such as sales forecast, sales budget, market potential and market share.

Determine need to prepare annual sales forecast by month for small business.

Use sources, such as Chamber of Commerce, public library, trade associations, bankers, accountants, manufacturers, suppliers, wholesalers and other entrepreneurs not in community, to identify market potential of product or service.

Determine fluctuation periods for sales.

Prepare graph or chart of annual sales forecast manually.

Prepare graph or chart of annual sales forecast using microcomputer.

Calculate market potential using electric/electronic calculator.

Calculate market share using electric/electronic calculator.

KNOWLEDGE (Cont.)

Apply trend analysis and linear regression analysis.
Add, subtract, multiply and divide whole numbers, decimals and percents using electric/electronic calculator.
Locate and use parts of microcomputer.
Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Locate and use parts of electric/electronic calculator.
Analyze differences between actual sales and sales forecast.

ATTITUDES

Forecast sales conservatively.
Base sales forecast on actual sales data.
Change sales forecast when needed.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure through effective planning.
Keep food and beverages away from equipment and copies of sales forecast chart to avoid damage to equipment, electrical shock to operator or having to reprint chart.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) sales forecast information frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Copy of actual sales by month for previous year
Electric/electronic calculator
Microcomputer with printer with graphics capability
Software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper
Pen or pencil
Graph paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-B: Construction and solution of proportions.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 4-E: Application of various techniques of graphing.
- Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Prepare operating budget

PERFORMANCE STANDARD Operating budget will be based on past business experience and realistic projections of future business opportunities, will be prepared for one year, will be broken down by each month and will be copied for and discussed with appropriate personnel.

STEPS

1. Obtain copies of previously prepared sales forecast and business income statement for previous accounting period.
2. Prepare annual operating budget manually.
    a. Obtain budget worksheets.
    b. Identify projected sales for next year from sales forecast and list on budget worksheet.
    c. Determine actual cost of goods sold for previous year from income statement.
    d. Calculate the percentage cost of goods sold was of sales (cost of goods sold / sales) using electric/electronic calculator.
    e. Estimate amount to budget for cost of goods sold (projected sales X cost of goods sold percentage) using electric/electronic calculator and list on budget worksheet.
    f. Calculate estimated gross profit for budget period (projected sales - estimated cost of goods sold) using electric/electronic calculator.
    g. Calculate percent of sales for each category of operating expense on the income statement (individual operating expenses / sales) using electric/electronic calculator.
    h. Adjust percentages, if needed, based on any goals established in business plan.
    i. Calculate estimated operating expenses for budget period (projected sales X individual operating expense percentage) using electric/electronic calculator and list on budget worksheet.
    j. Total estimated operating expenses on budget worksheet using electric/electronic calculator.
    k. Calculate estimated net profit (estimated gross profit - total estimated operating expenses) using electric/electronic calculator and list on budget worksheet.
    l. Prepare copies of operating budget worksheet for appropriate personnel using photocopier.

STEPS
(Cont.)

3. Prepare annual operating budget using microcomputer.
    a. Establish format for operating budget spreadsheet (cell size, cell format, etc.).
    b. Input title and column headings for operating budget spreadsheet.
    c. Input relevant data from income statement for previous accounting period (sales, cost of goods sold and operating expenses).
    d. Input formulas to calculate gross profit, total operating expenses and net profit in appropriate cells of operating budget spreadsheet.
    e. Input formulas in appropriate cells to calculate percentage of sales for each row on operating budget spreadsheet.
    f. Input formulas in appropriate cells on operating budget spreadsheet to calculate amounts budgeted for next year and to calculate estimated gross profit, estimated total operating expenses and estimated net profit.
    g. Identify projected sales for next year from sales forecast and input in appropriate cell of operating budget spreadsheet.
    h. Review actual percentage of sales for each expense category from previous year, and adjust percentages based on goals established in business plan.
    i. Input estimated percentage of sales for each expense listed on operating budget spreadsheet.
    j. Save operating budget spreadsheet.
    k. Print operating budget spreadsheet.
    l. Proofread and correct operating budget spreadsheet.
    m. Repeat Steps j-l until operating budget spreadsheet is finalized.
    n. Print copies of finalized operating budget spreadsheet for appropriate personnel.
4. Disseminate to and discuss with appropriate personnel finalized operating budget worksheet or spreadsheet.
5. Break down annual operating budget into monthly operating budgets, taking into consideration anticipated fluctuations in business.

KNOWLEDGE

Use terminology, such as operating budget, variable expenses, fixed expenses, cost of goods sold and income statement.
Determine need to prepare operating budget for a small business.
Identify fixed and variable expenses to include in an operating budget.
Recognize that variable expenses are linked directly to sales.
Differentiate between fixed and variable expenses.
Prepare sales forecast.
Add, subtract, multiply and divide whole numbers, decimals and percents using electric/electronic calculator.
Use spreadsheet software to prepare operating budget.
Establish formulas to complete calculations on operating budget spreadsheet.

KNOWLEDGE (Cont.)

Proofread printed operating budget spreadsheet.
Locate and use parts of microcomputer.
Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Locate and use parts of electric/electronic calculator.
Locate and use parts of photocopier.
Write legibly when preparing operating budget worksheet.

ATTITUDES

Recognize the value of an operating budget for a small business.
Recognize the need of employees to understand information contained in operating budget.
Make realistic estimates when preparing operating budget.
In addition, refer to Employability Skills List.

SAFETY

Control business operations through the preparation and administration of the operating budget.
Reduce risk of business failure by preparing and following realistic budget.
Keep food and beverages away from equipment and copies of operating budget to avoid damage to equipment, electrical shock to operator or having to prepare operating budget again.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) operating budget entries frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Income statement for previous accounting period
Sales forecast
Operating budget worksheets
Pencil
Electric/electronic calculator
Photocopier
Microcomputer with printer
Spreadsheet software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-F: Ability to revise, edit and proofread.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-B: Construction and solution of proportions.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

Social Sciences:
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Planning and Budgeting
TASK	Develop expense-control plan
PERFORMANCE STANDARD	Expense-control plan will provide realistic means for controlling business expenses and will be discussed with appropriate employees.
STEPS	1. Obtain and review copy of operating budget and/or income statement from previous accounting period. 2. Identify expenses which are excessive and need to be controlled. 3. Establish expense-control goals for business based on operating budget. 4. Establish productivity goals for individual employees based on expense-control goals for business. 5. Prepare copies of individual productivity goals and business expense-control goals using photocopier. 6. Distribute copies of expense-control goals and discuss with individual employees. 7. Compare performance of employee or business with established goals periodically. 8. Take corrective action if current performance is at variance with goals.
KNOWLEDGE	Determine need to establish expense-control plan for business and individual employees. Determine business expenses which can be controlled. Establish reasonable expense-control goals. Establish productivity goals for each employee. Use photocopier to make copies of expense-control goals. Locate and use parts of photocopier. Review, periodically, progress of business and individual employees in meeting expense-control goals. Write legibly when preparing expense-control plan.
ATTITUDES	Make expense-control goals reasonable and attainable. Recognize importance of involving employees in expense-control activities. In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure through use of effective cost-control measures.

Keep food and beverages away from photocopier and copies of expense-control plan to avoid damage to equipment, electrical shock to operator or having to recopy plan.

Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Copy of operating budget
Paper
Pen or pencil
Photocopier

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.

Social Sciences:
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Planning and Budgeting
TASK	Evaluate business performance compared to action plan
PERFORMANCE STANDARD	Progress toward completion of activities in action plan will be charted and discussed with responsible personnel.
STEPS	1. Obtain copy of previously prepared action plan or planning worksheets. 2. Design or obtain blank copies of work flowchart. 3. List each activity from planning worksheets on work flowchart. 4. Indicate due date for each activity on work flowchart. 5. Follow up with responsible employee(s) on progress toward completion of activity. 6. Chart progress toward completion of activity on work flowchart. 7. Indicate results of activity on planning worksheets as activities are completed. 8. Discuss progress toward completion of activities with responsible personnel.
KNOWLEDGE	Determine need to evaluate business progress based on action plan. Design work flowchart. Use work flowchart to chart progress toward activity completion. Use planning worksheet to show results of actions taken. Use graphic tape or marker to chart progress toward completion of activities.
ATTITUDES	Change action plan as needed. Recognize importance of involving responsible personnel in the evaluation of progress toward completion of activities in action plan. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of business failure through effective planning and evaluation.

EQUIPMENT AND MATERIALS

Completed action plan
Completed planning worksheets
Blank work flowcharts
Pen or pencil
Graphic tape
Marker

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.

Social Sciences:
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Analyze operating results in relation to budget

PERFORMANCE STANDARD Actual business sales and expenses will be reviewed monthly and compared to monthly operating budget.

STEPS

1. Obtain income statement for previous month.
2. Analyze operating results manually.
    a. Obtain copies of monthly operating budget worksheets.
    b. Fill in actual figure (dollar amount) for each budget item.
    c. Calculate actual and variance percentages between budget amount and actual amount using electric/electronic calculator.
3. Analyze operating results using microcomputer.
    a. Retrieve monthly operating budget spreadsheet.
    b. Format new columns for actual amounts, variance amounts and variance percentages, if needed.
    c. Input formulas to calculate actual and variance percentages between budget amount and actual amount.
    d. Input actual figure (dollar amount) for each budget item.
    e. Print updated monthly budget spreadsheet.
    f. Save updated monthly budget spreadsheet.
4. Evaluate variances, and highlight those which are adversely affecting business and need immediate attention.

KNOWLEDGE

Use terminology, such as income statement, budget and variance.
Determine need to compare actual business operation with operating budget.
Match items on income statement with those on monthly budget.
Use microcomputer to analyze operating results.
Use spreadsheet software.
Locate and use parts of microcomputer.
Locate and use parts of printer.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.
Determine formulas to calculate actual and variance percentages.
Calculate actual and variance percentages using electric/electronic calculator.
Locate and use parts of electric/electronic calculator.
Add, subtract, multiply and divide whole numbers using electric/electronic calculator.

ATTITUDES

Recognize importance of knowing current business status.
Make decisions and take actions quickly to correct situations that adversely affect business.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure by being aware of variances between budgeted figures and actual business operating figures and by quickly taking actions to correct variances which adversely affect business.
Keep food and beverages away from equipment and copies of monthly operating budget worksheet or spreadsheet to avoid damage to equipment, electrical shock to operator or having to redo operating budget worksheet or spreadsheet.
Keep microcomputer and magnetic media away from magnetic fields to avoid loss of stored (saved) work.
Store (save) monthly operating budget information frequently to avoid loss of work due to power failure or power surge.
Maintain backup copies of all information on separate media.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Income statement for previous accounting period
Monthly operating budget worksheets
Electric/electronic calculator
Pen or pencil
Monthly operating budget spreadsheet
Microcomputer with printer
Spreadsheet software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:
    Goal 1-A: Ability to read, write and name numbers in several different ways.
    Goal 1-B: Ability to perform operations with numbers with and without a calculator.
    Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
    Goal 2-D: Interpretations of percents in various settings.
    Goal 2-E: Application of percents in real-life situations.
    Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
    Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.
    Goal 7-A: Rounding numbers.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-H: Roles of individuals and/or groups in effecting change.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Planning and Budgeting

TASK Take corrective steps to bring performance in line with action plan and budget

PERFORMANCE STANDARD Business operating performance will be in line with action plan and budget.

STEPS

1. Obtain copies of completed planning worksheets, work flowcharts and monthly budget worksheet or spreadsheet.
2. Review planning worksheets and work flowcharts to identify activities which will not be completed by the due date.
3. Discuss potential problems with responsible person.
4. Determine actions to be taken to complete activity as scheduled or determine alternative activities to be completed.
5. Revise planning worksheets and work flowcharts to reflect any revisions.
6. Review monthly operating budget worksheet or spreadsheet which compares budgeted figures to actual figures, actual variances and variance percentages.
7. Highlight variances which are adversely affecting business and need immediate attention.
8. Determine methods of reducing identified variances.
9. Prepare photocopies of planning worksheets, work flowcharts and monthly operating budget worksheet or spreadsheet for appropriate personnel.
10. Work with appropriate personnel to implement activities to meet action plan and to implement methods of reducing identified variances.

KNOWLEDGE

Determine need to keep action plan and budget on target.
Use terminology, such as budget, variance, action plan and activity.
Locate planning worksheets, work flowcharts and monthly operating budget worksheet or spreadsheet.
Locate and use parts of photocopier.
Discuss corrective steps to be taken with appropriate personnel.

ATTITUDES

Recognize importance of knowing current business status.
Recognize importance of involving key personnel in updating of action plan and monthly operating budget.
Make decisions and take actions quickly to keep business operations on target.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business failure through effective administration of business action plan and operating budget.
Keep food and beverages away from photocopier and copies of planning worksheets, work flowcharts and monthly operating budget worksheet or spreadsheet to avoid damage to equipment, electrical shock to operator or having to recopy documents.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Completed planning worksheets
Completed work flowcharts
Monthly operating budget worksheet or spreadsheet
Photocopier
Paper
Pen or pencil

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

**ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)**

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

FOR

BUSINESS, MARKETING

AND MANAGEMENT OCCUPATIONS

CLUSTER: **BUSINESS OWNERSHIP/MANAGEMENT**

OCCUPATION: **SMALL BUSINESS OWNER/OPERATOR**

Duty Area: Managing Business Operations

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Design business layout

PERFORMANCE STANDARD Business layout will provide for most effective and economical use of space, will carry out image desired for business and will help reduce merchandise thefts.

STEPS

1. Review trade publications and/or visit similar businesses to gather ideas on trends in business layout.
2. Seek assistance from manufacturers of equipment, furnishings and fixtures; an architect and trade associations, as needed, when planning business layout.
3. Determine if there are any federal, state and/or local government regulations that apply to business layout.
4. Measure interior floor of business building.
5. Draw interior floor of business building to scale.
6. Determine areas, such as the following, to include on scale drawing:
    - a. Selling floor.
    - b. Receiving and storing areas for merchandise.
    - c. Business operations, such as management, credit and recordkeeping.
    - d. Plumbing, heating, air-conditioning and electrical systems.
    - e. Production area.
7. Mark off identified areas on scale of interior floor.
8. Draw aisles, displays, fixtures, furnishings and equipment on scale of interior floor.
9. Plan for interior lighting of business.
10. Analyze draft business layout based on the following:
    - a. Federal, state and local government regulations.
    - b. Effect of layout on sales or production.
    - c. Reduction of merchandise theft.
    - d. Flow of traffic into, around and out of business.
    - e. Visibility of merchandise.
    - f. Adequacy of receiving and storing areas for needed stock and supplies.
    - g. Adequacy of business operations areas.
    - h. Adequacy of plumbing, heating, air-conditioning and electrical system areas.
    - i. Desired mood or image of business.
11. Revise business layout based on above analysis.

KNOWLEDGE

Use terminology, such as equipment, fixtures, furnishings, store design, store layout, decor, general lighting, wall lighting, display lighting, impulse goods, convenience goods, shopping goods, feature units, merchandise island, ends and self-service fixtures.

Keep business fixtures flexible and portable to enable quick adjustments for seasonal goods, fast-selling items, customer traffic and new look for business.

Use graph paper to draw business layout to scale.

Calculate size of business interior, equipment, fixtures, displays, furnishings and aisles to scale.

Determine general functions of business fixtures, such as project store image, promote sale of merchandise and provide merchandise protection.

Recognize that business layout has a direct relationship to dollar amount of sales per square foot.

Locate nonselling activities in back of business or on upper levels of building.

Locate related items within a department and related departments within business near each other to encourage suggestion selling.

Locate impulse and convenience goods near entrances and aisles where traffic is heaviest.

Locate shopping goods away from entrances and major traffic aisles.

Determine impact of wide and shallow departments on sales.

Make major aisles wide enough to permit three or more people to walk abreast.

Make minor aisles wide enough for two or more people to walk abreast.

Locate fixtures at store entrance to guide customers away from door area.

Keep counters, cases and shelving, except wall fixtures, low enough to permit customers to view entire selling floor.

Arrange store fixtures so all merchandise is readily visible and easy to examine.

Determine advantages of good lighting, heating and air conditioning.

Locate manufacturing equipment to facilitate work flow and maintain safe work environment.

ATTITUDES

Recognize that customers tend to stay longer, buy more and return frequently to a business they find warm, attractive and comfortable.

Reduce employee fatigue through use of good lighting and heating and air-conditioning systems.

Provide access to business for customers with special needs.

In addition, refer to Employability Skills List.

SAFETY

- Set display fixtures in broken sequence to discourage theft.
- Keep expensive items in locked display cases.
- Keep selling and stock areas orderly to reduce theft of merchandise.
- Use two-way mirrors to reduce theft of merchandise.
- Comply with all federal, state and local regulations when planning business layout.

EQUIPMENT AND MATERIALS

- Trade publications
- Graph paper
- Pencil
- Tape measure
- Straightedge or ruler

SOURCE OF ANALYSIS

- Summary of available resources.
- Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-B: Construction and solution of proportions.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 3-A: Measurement in various contexts using appropriate units.
- Goal 3-E: Application of selected measurement systems, instruments and techniques.
- Goal 4-E: Application of various techniques of graphing.
- Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.
- Goal 7-A: Rounding numbers.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Business Operations
TASK	Determine equipment and supplies needed
PERFORMANCE STANDARD	A list of equipment and supplies needed to operate business will be prepared.
STEPS	1. Determine quantities and types of equipment and supplies currently owned by business by inventorying equipment and supplies or by obtaining a copy of a recent inventory. 2. Review trade publications and equipment and supply catalogs, contact trade associations, attend trade shows, talk with vendors and/or visit competitors to identify new equipment and supplies to add to inventory. 3. Determine types and quantities of equipment and supplies needed to operate business successfully (both equipment and supplies currently used and new items). 4. Compare quantities and types of equipment and supplies currently owned with those needed. 5. Calculate quantities of equipment and supplies to purchase using electric/electronic calculator. 6. Prepare list of equipment and supplies to purchase.
KNOWLEDGE	Use terminology, such as furnishings, fixtures, office equipment, sales equipment, storage equipment and manufacturing equipment. Determine need to keep business equipment up to date. Determine need to maintain adequate quantities of business supplies on hand. List equipment currently used by business, such as furnishings, fixtures, sales equipment, manufacturing equipment, storage equipment and office equipment. List equipment and supplies that would enhance business operation. Determine which equipment can be expensed and which must be capitalized. Complete periodic physical inventory of equipment and supplies. Determine sources for obtaining business equipment and supplies. List supplies currently used by business, such as office supplies, sales supplies, pricing supplies, packaging supplies and manufacturing supplies. Add, subtract, multiply and divide whole numbers using electric/electronic calculator. Locate and use parts of electric/electronic calculator.

ATTITUDES

Maintain business image through the selection of appropriate equipment and supplies.
Recognize needs of all customers and employees when purchasing business equipment and supplies.
In addition, refer to Employability Skills List.

SAFETY

Select business equipment and supplies which will provide a safe environment for customers and employees.
Keep food and beverages away from equipment to avoid damage to equipment or electrical shock to operator.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Equipment and supply inventories
Equipment and supply catalogs
Trade publications
Lists of trade shows, trade associations and vendors
Electric/electronic calculator
Paper
Pen or pencil

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.

Social Sciences:
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Purchase equipment and supplies

PERFORMANCE STANDARD Equipment and supplies will be purchased based on the most favorable price, discount options, payment arrangement and delivery schedule. Equipment and supplies purchased will also complement or enhance business image.

STEPS

1. Obtain previously prepared list of equipment and supplies needed for business.
2. Prioritize equipment and supply purchases.
3. Identify suppliers of prioritized equipment and supplies through sources, such as telephone and industry directories, trade associations, trade magazines or newspapers, trade shows, business associates and equipment and supply catalogs.
4. Contact suppliers to obtain information on quality, price, terms, delivery and service.
5. Prepare resource card of information gathered for each supplier contacted and maintain in resource file.
6. Analyze information received for each piece of equipment or supply being purchased.
7. Prioritize possible suppliers.
8. Determine reputation of identified suppliers and ability of suppliers to meet business needs.
9. Select suppliers.
10. Negotiate terms of purchase, such as price, delivery, discounts and dating.
11. Prepare and sign purchase order.
12. Submit purchase order to appropriate suppliers.
13. File copy of purchase order for future reference.

KNOWLEDGE Use terminology, such as cash discount, FOB city of destination, FOB shipping point, FOB store, quantity discount, trade discount, seasonal discount, image, competitive bids, negotiation, vendor, supplier, purchase order, EOM dating, ROG dating, ordinary dating, advanced dating, extra dating, anticipation dating, resource card and resource file.
Determine priority for purchasing selected supplies and equipment.
List potential suppliers.
Investigate leasing vs. buying options for equipment.
Prepare resource file and resource cards for each supplier.
Write legibly.

KNOWLEDGE (Cont.)

Analyze information on quality, price, terms, delivery and service to determine which supplier(s) will best meet needs of business.
Prepare purchase order.
Calculate total purchase price for each item ordered on purchase order using electric/electronic calculator.
Calculate total of all items purchased on purchase order using electric/electronic calculator.
Add, subtract, multiply and divide whole numbers and decimals using electric/electronic calculator.
Locate and use parts of electric/electronic calculator.
Apply alphabetic and subject filing systems.

ATTITUDES

Prepare purchase order accurately.
Recognize the value of shopping for equipment and supply purchases.
Recognize the value of taking discounts by prompt payment of invoices.
Maintain business image through the purchase of appropriate equipment and supplies.
Recognize the needs of all customers and employees when purchasing business equipment and supplies.
In addition, refer to Employability Skills List.

SAFETY

Investigate reputation of potential suppliers to ensure their ability to adequately serve business needs.
Select business equipment and supplies which will provide a safe environment for customers and employees.
Keep food and beverages away from equipment and copies of purchase orders to avoid damage to equipment, electrical shock to operator or having to redo purchase orders.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

List of equipment and supplies to purchase
Equipment and supplies catalogs
Trade publications
Lists of trade shows, trade associations and vendors
Index cards
File
Blank purchase orders
Electric/electronic calculator
Pen or pencil

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
- Goal 7-A: Rounding numbers.

Social Sciences:
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Establish policies and procedures for business security

PERFORMANCE STANDARD Policies and procedures relating to business security will be written, and copies will be distributed to all employees. Employees will be trained on written policies and procedures periodically.

STEPS

1. Determine areas of business security, such as theft, business protection and safety, for which policies and procedures need to be developed.
2. Write business policies for each identified area.
3. List possible security problems in each identified area.
4. Write step-by-step procedures for handling each identified security problem.
5. Prepare copies of written business security policies and procedures for each employee using photocopier.
6. Distribute copies of written business security policies and procedures to each employee.
7. Train employees on business security policies and procedures periodically.

KNOWLEDGE

Use terminology, such as policy, procedure, internal theft, external theft, stock shortages, larceny, embezzlement, pilferage, shoplifting, till dippers, change bluffers, short-change artists, split-bill passers, counterfeiters, underring, no-sale, overcharging, opportunists and kleptomaniacs.
List types of external theft.
List types of internal theft.
Keep current on laws and regulations relative to the apprehension of internal or external theft suspects.
Set up effective countermeasures to internal theft by imagining what a dishonest employee might do to steal from business.
Inspect business property to determine locations where business might be burglarized or where merchandise might be hidden for theft.
Analyze various surveillance methods and techniques.
List ways of providing protection for business.
Inspect business for possible hazards.
List ways of reducing or eliminating hazards.
Locate and use parts of photocopier.

KNOWLEDGE (Cont.)	Provide employee training on business security policies and procedures periodically. Write legibly when preparing policies and procedures.
ATTITUDES	Recognize the importance of training employees on business security policies and procedures. In addition, refer to Employability Skills List.
SAFETY	Develop business security policies and procedures in strict accordance with the law. Keep food and beverages away from photocopier and copies of policies and procedures to avoid damage to photocopier, electrical shock to operator or having to recopy policies and procedures. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Paper Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-E: Use of standard written English conventions. Goal 4-A: Clear and expressive speaking. Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.

Goal 3-B: Selected principles of learning and motivation.

Goal 3-G: Selected types of antisocial behavior and various methods of intervention.

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-G: Ways to utilize the various levels of government.

Goal 5-H: Roles of individuals and/or groups in effecting change.

Goal 5-I: Roles of the individual in the world of work.

Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Follow established procedures for handling theft

PERFORMANCE STANDARD Action will be taken to handle each identified theft as it occurs.

STEPS

1. Determine that a theft has taken place (or is taking place) and what is missing.
2. Determine type of theft, such as:
   a. Internal theft.
   b. External theft.
   c. Burglary.
3. Determine how theft was committed (or is being committed).
4. Determine procedures that apply for each theft.
5. Take action identified in appropriate procedure.
6. Determine how to legally handle a situation when a thief is apprehended.

KNOWLEDGE

Use terminology, such as internal theft, external theft, shoplifting, stock shortages, larceny, embezzlement, pilferage, till dippers, change bluffers, short-change artists, split-bill passers, counterfeiters, underring, no-sale, overcharging, opportunists and kleptomaniacs.
Establish loss-prevention programs to discourage internal and external theft.
Determine methods of controlling shoplifting.
Post signs warning customers of the consequences of shoplifting.
Train employees to spot and handle shoplifters.
Train employees to spot and handle till dippers, change bluffers, short-change artists, split-bill passers and counterfeiters.
Determine types of employee theft, such as theft of merchandise, theft of cash and theft of time.
Watch for signs of dishonest employees, such as employees with financial problems or excessive spending habits, employees who unnecessarily arrive at work early and stay late, unhappy employees, merchandise stacked in unusual places, frequent cash register discrepancies in cash funds and frequent alterations in records.

KNOWLEDGE (Cont.)

Watch for signs of employee theft of merchandise, such as passing merchandise to accomplices, giving discounts to unauthorized persons, giving unauthorized markdowns to self or others, writing fake sales slips to pick up merchandise at dock, smuggling merchandise out of store in trash, switching price tickets and taking supplies or equipment.
Watch for signs of employee theft of cash, such as underrings, no-sales, overcharging, setting up false credit accounts, making false entries in credit accounts, giving improper refunds and taking cash from register or petty cash fund.
Watch for signs of employee theft of time, such as misuse of time, lateness, excessive absenteeism, fraudulent claims for worker's compensation, falsifying payroll records and punching time clock or signing out for others.
Establish strict discipline policies to deal with employee theft.
Take action in every case of employee dishonesty.
Keep current on laws and regulations relative to the apprehension of internal or external theft suspects.
Set up effective countermeasures to internal theft by imagining what a dishonest employee might do to steal from business.
Inspect business property to determine locations where business might be burglarized or where merchandise might be hidden for theft.

ATTITUDES

Build positive employer-employee relations to reduce losses due to internal theft.
Show employees that management views dishonesty as both immoral and illegal.
Recognize the importance of training employees to detect internal and external theft and to report or apprehend suspects.
In addition, refer to Employability Skills List.

SAFETY

Install television cameras that scan entrances, exits and checkout counters.
Place mirrors at key locations.
Attach special inventory tags to merchandise which signal removal of merchandise from business.
Close off unused checkout aisles.
Keep expensive items in locked display cases.
Keep important records in secure location.
Authorize entry into computerized records to specific personnel.
Apprehend internal and external theft suspects in strict accordance with the law.
Ensure that a theft has occurred prior to apprehending shoplifters to prevent legal problems.
Screen new employees carefully, and contact references to reduce risk of theft.
Install door alarms on exit doors that are to be used only during emergencies.
Change door locks periodically.
Set display fixtures in broken sequence to discourage theft.

SAFETY (Cont.)

Use low fixtures and displays which do not give visual protection to shoplifters.
Keep selling and stock areas orderly to reduce theft of merchandise.
Safeguard merchandise on loading dock.
Set up safeguards to monitor the disposal of boxes and trash.

EQUIPMENT AND MATERIALS

Copy of business theft policies and procedures

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Follow established security procedures for opening and closing the business

PERFORMANCE STANDARD Established security procedures will be strictly followed each time the business is opened or closed.

STEPS

1. Establish step-by-step procedures to follow to open or close business or obtain and review copy of established procedures.
2. Follow established procedures, such as the following, to open business:
    a. Look for possible security problems before entering building.
    b. Check all outer doors to ensure that they are locked prior to entering building.
    c. Unlock and open entrance door.
    d. Relock door after entering business.
    e. Turn on lights.
    f. Turn off burglar alarm.
    g. Turn off interior/exterior security lights.
    h. Check inside of business to ensure that it is secure.
    i. Notify employees that it is safe to enter business using an established signal.
    j. Unlock safe or vault.
    k. Unlock entrance doors to open business.
3. Follow established procedures, such as the following, to close business:
    a. Walk through the inside of the business to determine that it is secure and all customers/employees have left.
    b. Check all exit doors and windows to make sure they are locked.
    c. Check restrooms, stockroom, storage room and stairs/stairwells to make sure they are secure.
    d. Turn on interior/exterior security lights.
    e. Remove security signal to employees (see "i" above).
    f. Lock safe or vault.
    g. Activate burglar alarm.
    h. Check outside of business while still inside.
    i. Turn off lights.
    j. Close and lock entrance door.
    k. Check door to ensure that it is securely closed and locked.

KNOWLEDGE	Determine need for small business to establish security procedures to open and close business. Determine need for small business to follow established security procedures to open and close business. Establish procedures to follow to open or close business. Determine ways to tell if building is secure prior to entering business each day. Locate and check all doors prior to entering business each day. Call police or security guard prior to entering business if building does not look secure. Determine need to relock entrance door after entering business. Follow established steps to turn on or off burglar alarm so it will not be set off accidentally. Determine locations where thief might hide in business after it is closed. Establish a signal to notify all employees that it is safe to enter business. Follow established steps to unlock and lock safe or vault. Determine need to check the outside of the business prior to leaving. Call police or security guard if suspicious person is loitering outside building after business hours.
ATTITUDES	Recognize the need to establish and strictly follow procedures to open and close business each day. Show concern for the safety of employees. In addition, refer to Employability Skills List.
SAFETY	Reduce threats to business security by following established security procedures for opening and closing business each day. Reduce risk of being injured by burglar by not entering business when it does not appear to be secure. Reduce risk of being mugged by checking outside of building prior to exiting after closing business. Increase employee safety by establishing a signal to notify them that it is safe to enter business.
EQUIPMENT AND MATERIALS	Established security policies and procedures Business to be opened or closed
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.

Social Sciences:
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Establish safety program

PERFORMANCE STANDARD All safety procedures will be written and disseminated to employees. Employees will be trained to follow established safety procedures.

STEPS

1. Obtain and review local, state and federal safety regulations.
2. Identify areas to be covered by safety program, such as fire safety and accident prevention.
3. Form safety committee of employees to be involved in the development of safety procedures.
4. Write step-by-step safety procedures for fire prevention including:
   a. Inspecting electrical equipment regularly for defects.
   b. Inspecting for defective wiring regularly.
   c. Using proper electrical connections.
   d. Storing flammable liquids.
   e. Storing boxes and paper.
   f. Observing smoking regulations.
   g. Unlocking and unblocking fire exits.
   h. Testing fire extinguishers regularly.
   i. Scheduling on-site inspections by fire inspector.
5. Write step-by-step safety procedures to follow in case of a fire including:
   a. Assisting customers.
   b. Exiting building.
   c. Using fire extinguishers.
6. Write step-by-step safety procedures for accident prevention including:
   a. Inspecting premises regularly for hazards, such as torn carpets; boxes in aisles; drawers that are open when not in use; loose stairs, balconies and railings; spills and slick floors.
   b. Inspecting and maintaining equipment regularly.
   c. Posting warning signs and safety rules for employees and customers.
   d. Keeping walks and outdoor areas free of debris, ice and snow.
   e. Providing adequate lighting and ventilation.
   f. Marking exits adequately.
   g. Designing business layout to prevent accidents.

STEPS (Cont.)

7. Write step-by-step safety procedures to follow in case an accident occurs including:
   a. Completing accident reports.
   b. Assisting accident victim.
   c. Investigating accidents and near-accidents.
   d. Reporting accidents to management and insurance company.
8. Prepare copies of written safety procedures for each employee using photocopier.
9. Distribute copies of written safety procedures to each employee.
10. Train employees to follow established safety procedures.
11. Reinforce the importance of safety with employees frequently.

KNOWLEDGE

Use terminology, such as safety program and Occupational Safety and Health Administration (OSHA).
Determine need for small business to establish and follow safety procedures.
Determine applicable safety regulations established by local, state and federal government agencies.
Comply with OSHA regulations.
Determine fire prevention procedures.
Determine potential fire hazards.
Determine safety procedures to follow during a fire.
Determine accident prevention procedures.
Determine potential accident hazards and dangerous work practices.
Determine procedures to follow in case of an accident.
Fill out accident reports.
Train all employees in safety procedures and safe work habits.
Locate and use parts of photocopier.
Write legibly when preparing written safety policies and procedures.

ATTITUDES

Recognize that the employer is responsible for employees and customers while on the premises.
Recognize the importance of involving employees in the development and enforcement of safety procedures.
Recognize the importance of keeping employees up to date on safety procedures.
Emphasize overall importance of safety.
In addition, refer to Employability Skills List.

SAFETY

Inspect building, equipment and working conditions regularly.
Enforce no-smoking rules and regulations.
Remove all identified safety hazards.
Post warning signs, exit signs and safety rules.
Keep walks and outside areas free of debris and ice and snow.
Comply with OSHA standards.
Provide adequate lighting and ventilation in work area.
Make sure customers and employees are using equipment properly.
Keep exit doors unlocked while people are in building.
Keep floors clean and free of grease and other spills.

SAFETY (Cont.)	Design safe building layout. Do not move accident victim. Do not attempt first aid unless trained to do so. Keep food and beverages away from photocopier and copies of safety procedures to avoid damage to equipment, electrical shock to operator or having to recopy safety procedures. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copies of local, state and federal safety rules and regulations Paper Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-E: Use of standard written English conventions. Goal 4-A: Clear and expressive speaking. Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Follow procedures in handling employee or customer accidents

PERFORMANCE STANDARD Established accident procedures will be strictly followed each time an accident occurs.

STEPS

1. Locate and review procedures to be followed in handling an employee or customer accident.
2. Follow established procedures for handling accidents:
   a. Direct customer traffic away from accident scene.
   b. Question victim about injury.
   c. Call for necessary emergency assistance.
   d. Obtain full and accurate report of accident from injured person.
   e. Arrange transportation for injured person to hospital or doctor.
   f. Notify doctor or hospital that injured person is enroute.
   g. Notify injured person's family.
   h. Obtain written statements from witnesses.
   i. Complete accident reports.
   j. File accident reports.
   k. Follow up on injured person's condition.
   l. Notify insurance company.

KNOWLEDGE

Determine need for small business to establish and follow procedures for handling employee or customer accidents.
Question injured person and any witnesses to obtain complete and accurate information about the accident.
Determine when emergency assistance is needed.
Arrange for transportation of injured person to hospital or doctor.
Determine names of injured person's doctor and family members who need to be notified.
Complete necessary accident reports.
Write legibly when completing reports.
File accident reports for future reference.
Determine name of appropriate insurance company to notify that accident has occurred.

ATTITUDES

Reporting accidents accurately.
Show sensitivity when caring for accident victim.
Remain calm while handling accident.
Keep personal opinions concerning accident to self.
In addition, refer to Employability Skills List.

SAFETY

Avoid lawsuits through the accurate reporting of accidents.
Do not move injured person.
Obtain verification of accident from witnesses.
Attempt first aid only if fully trained.

EQUIPMENT AND MATERIALS

Copy of accident procedures
Telephone directory
Paper
Accident report forms
Pen or pencil

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.

Physical Development and Health:
- Goal 7-B: Rescue skills appropriate to various life-threatening situations.
- Goal 7-C: Essential skills and procedures for use in life-threatening situations.

Social Sciences:
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Business Operations
TASK	Establish maintenance and housekeeping program
PERFORMANCE STANDARD	Maintenance programs for building and equipment will be established. Interior and exterior housekeeping programs will be established. Employees will be trained to conduct maintenance and housekeeping programs and will be evaluated on these activities.

STEPS

1. Locate and review any applicable local, state or federal regulations.
2. Determine maintenance and housekeeping programs to establish for specific business.
3. Establish program to make building repairs.
   a. Determine repairs which need to be made to building.
   b. Prioritize repairs.
   c. Establish schedule to complete building repairs.
4. Establish program to maintain building.
   a. Determine maintenance activities which need to be completed periodically, such as exterior and interior painting, wallpapering and replacing light bulbs.
   b. Prioritize building maintenance activities.
   c. Establish schedule to complete building maintenance activities.
5. Establish program to repair equipment.
   a. Identify equipment which needs to be repaired.
   b. Prioritize repairs.
   c. Determine if equipment is covered by warranty or service contract.
   d. Establish schedule to complete equipment repairs.
6. Establish program to maintain equipment.
   a. Review equipment manuals to determine needed maintenance and recommended maintenance intervals.
   b. Determine maintenance activities to be completed under previously negotiated service contract.
   c. Prepare maintenance chart for all equipment which shows all maintenance activities, person responsible for completing each activity, date on which maintenance is to be completed and date on which maintenance is actually completed.
   d. Post maintenance schedule.
   e. Check to make sure preventive maintenance is being completed as scheduled.

STEPS
(Cont.)

7. Establish housekeeping program.
    a. Identify exterior and interior housekeeping needs.
    b. Prepare housekeeping chart which shows all activities, person responsible for completing each activity, frequency of performance and date of completion.
    c. Check interior and exterior appearance daily to ensure that housekeeping activities are being completed.
    d. Rotate housekeeping assignments among employees.
8. Establish performance standards for each maintenance or housekeeping activity being performed by employees.
9. Prepare copies of equipment maintenance chart, housekeeping chart and performance standards for each employee using photocopier.
10. Distribute copies to appropriate employees.
11. Train employees to complete maintenance and housekeeping activities to meet established standards of performance.
12. Evaluate employees on the completion of maintenance and housekeeping activities.

KNOWLEDGE

Determine need to establish maintenance and housekeeping programs for small business.
Determine the types of maintenance and housekeeping programs which need to be established for business.
Determine repairs to be made to building and equipment.
Determine maintenance activities to be completed on building and equipment.
Use equipment manuals to determine needed maintenance and recommended schedules.
Establish priorities for making repairs and performing maintenance activities.
Establish schedules for making repairs and performing maintenance activities.
Determine who will make repairs and perform maintenance activities.
Write legibly when preparing charts.
Check to ensure that maintenance activities are being completed as scheduled.
Determine interior and exterior housekeeping activities which need to be completed.
Establish schedule for completing housekeeping activities.
Establish performance standards for completing maintenance and housekeeping activities.
Assign housekeeping activities to employees.
Evaluate interior and exterior appearance of business.
Locate and use parts of photocopier.
Train employees to perform maintenance and housekeeping activities.
Evaluate employees on performance of maintenance and housekeeping activities based on established standards.

ATTITUDES

Recognize the need to keep building and equipment repaired.
Recognize the need to perform periodic maintenance on building and equipment.
Recognize the effects of interior and exterior appearance of business on customers and employees.
Recognize the need to establish performance standards and to make employees aware of these standards.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk to customers and employees by keeping building and equipment in good repair.
Increase life of equipment by performing maintenance as recommended by manufacturer.
Reduce risk of lawsuits by keeping building and equipment in good repair.
Remove debris, ice and snow from sidewalks to reduce risk of injury to customers and employees.
Reduce risk of employee injury through proper maintenance of equipment.
Keep food and beverages away from photocopier to avoid damage to equipment or electrical shock to operator.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Copies of local, state and federal regulations
Equipment manuals
Building needing to be repaired
Equipment needing to be repaired
Paper
Pen or pencil
Photocopier

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
Goal 1-A: Recognition, recall and summarization of material read.
Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
Goal 1-F: Integration of information from more than one text.
Goal 2-C: Inferences from spoken messages and nonverbal cues.
Goal 2-D: Distinction among different purposes in communication.
Goal 2-E: Differing perspectives and points of view.
Goal 2-F: Effective and appropriate responses.
Goal 4-A: Clear and expressive speaking.
Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
Goal 4-C: Development of ideas with appropriate support materials.
Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
Goal 4-E: Use of language for a variety of purposes.
Goal 6-D: English grammar.

Social Sciences:
Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
Goal 3-B: Selected principles of learning and motivation.
Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-B: Sources of information evaluated in terms of selective criteria.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
Goal 5-G: Ways to utilize the various levels of government.
Goal 5-H: Roles of individuals and/or groups in effecting change.
Goal 5-I: Roles of the individual in the world of work.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Negotiate service and maintenance contracts

PERFORMANCE STANDARD Service and maintenance contracts will be negotiated to meet specific business needs, will be reviewed by business attorney and will be signed.

STEPS

1. Determine which service and maintenance activities cannot be performed by employees.
2. Determine specifically what services and maintenance activities need to be covered in service contracts.
3. Contact service companies and manufacturers to determine availability of service contracts.
4. Obtain information about service contracts, such as activities offered, turnaround time for making repairs, availability of replacement equipment, frequency of maintenance activities and price.
5. Compare information gathered with identified needs.
6. List contractors that appear to best meet business needs.
7. Check reputation of contractors that appear to best meet identified needs.
8. Obtain bids or estimates from recommended contractors.
9. Select best service contracts and contractors.
10. Notify chosen contractors.
11. Work with contractor, if possible, to modify contract to fit specific needs.
12. Have all contracts reviewed by business attorney prior to signing.
13. Sign contracts.
14. File copies of contracts for future reference.

KNOWLEDGE

Determine need to have service and maintenance contracts on business equipment and building.

Determine equipment which could and should be covered by service contracts.

Determine services related to building, such as cleaning, which can and should be covered by service contracts.

Use telephone and trade directories to identify service companies and manufacturers that offer needed service contracts.

List services needed in service contracts.

List services and prices available from contractors.

Analyze the costs/benefits of performing service and maintenance work yourself or having it completed by a service company.

KNOWLEDGE (Cont.)

Analyze the costs/benefits of maintaining service contracts rather than obtaining repairs as needed.
Contact other entrepreneurs, trade associations and Better Business Bureau to determine reputation of contractors.
Have all contracts reviewed by attorney prior to signing.
Apply basic filing rules.

ATTITUDES

Recognize need to keep building and equipment repaired.
Recognize need to perform periodic maintenance on building and equipment.
Recognize the effect of interior and exterior appearance of business on customers and employees.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business losses by maintaining equipment and building.
Have all contracts reviewed by attorney.
Increase life of equipment through proper maintenance.
Reduce risk of employee injury through proper maintenance of equipment.

EQUIPMENT AND MATERIALS

Paper
Pen or pencil
Telephone and trade directories

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Establish fire prevention program

PERFORMANCE STANDARD Fire prevention program will be written, and employees will be trained to perform fire safety activities.

STEPS

1. Contact local, county, state and federal officials to determine applicable fire safety or building code regulations.
2. Obtain and post signs identifying local, county, state or federal fire regulations.
3. Obtain and review equipment manuals for sprinkler system, fire extinguishers and fire and smoke alarms to determine how often they should be inspected and/or tested.
4. Prepare and post schedule for inspecting and/or testing fire extinguishers, sprinkler system, fire alarms and smoke alarms.
5. Prepare and post business layout showing location of all fire extinguishers, fire alarms, smoke alarms, escape routes and fire exits.
6. Establish areas for storage of hazardous materials, rags and papers.
7. Establish procedures to dispose of hazardous materials.
8. Establish smoking and no-smoking areas.
9. Post signs to designate areas where hazardous materials are stored and smoking and no-smoking areas.
10. Provide employees with copies of fire prevention procedures and business layout showing locations of fire extinguishers, fire alarms, smoke alarms, escape routes and fire exits.
11. Train employees on fire prevention procedures.

KNOWLEDGE

Determine need for small business to establish and follow fire prevention program.

Determine local, county, state or federal fire safety regulations.

Determine local, county or state building codes relative to fire prevention.

Use equipment manuals to determine frequency of testing and inspecting of fire safety equipment.

Follow established procedures to inspect sprinkler system and to test fire extinguishers, fire alarms and smoke alarms.

Draw business layout to scale.

Identify any hazardous materials which require special storage and/or disposal.

KNOWLEDGE (Cont.)	Determine appropriate types of storage needed for hazardous materials, rags and papers. Determine appropriate methods to dispose of hazardous materials. Control or eliminate use of dangerous space heaters. Use photocopier to prepare copies of fire prevention procedures and business layout. Locate and use parts of photocopier.
ATTITUDES	Show concern for safety of employees and customers through the establishment of a fire safety program. Recognize the importance of training employees on fire safety program. In addition, refer to Employability Skills List.
SAFETY	Reduce risk to employees and customers by establishing and following fire prevention procedures. Reduce risk of business losses by establishing and following fire safety procedures. Post signs identifying local, county, state and/or federal fire safety regulations. Post signs regarding smoking on premises. Reduce risks to employees and customers by training employees in fire safety procedures. Keep food and beverages away from photocopier and prepared copies to avoid damage to equipment, electrical shock to operator or having to remake copies. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copies of local, county, state and federal fire safety regulations Equipment manuals Paper Pen or pencil Materials to make signs Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS
STATE GOALS
FOR
LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 3-A: Measurement in various contexts using appropriate units.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Follow procedures for handling fires

PERFORMANCE STANDARD Fire procedures will be followed when extinguishing fires or notifying fire department of fires.

STEPS

1. Determine that a fire is in progress.
2. Determine type of fire, such as electrical or grease.
3. Determine if fire can and should be extinguished without the assistance of the fire department.
4. Escort customers and employees calmly to a safe location.
5. Follow established procedures to extinguish fire without assistance of fire department:
   a. Select appropriate procedures and extinguishing materials for type of fire.
   b. Locate appropriate extinguishing materials.
   c. Extinguish fire.
6. Follow established procedures to obtain assistance from fire department:
   a. Set off fire alarms.
   b. Call fire department.
   c. Obtain emergency medical assistance, if needed.
   d. Make sure all employees and customers are safely escorted away from building to safe location.
   e. Leave building to await arrival of fire department and other emergency assistance.
   f. Notify fire fighters of the location and type of any hazardous materials or explosives.

KNOWLEDGE

Determine cause of fire.
Determine when fire can be safely extinguished or when fire department needs to be contacted.
Match fire extinguishing materials with different types of fires.
Locate fire extinguishing materials and/or fire alarms.
Practice using fire extinguishers and setting off fire alarms.
Plan alternative fire escape routes and safe waiting areas.
Conduct fire drills for employees so they are familiar with escape procedures and are prepared to assist customers.
Place emergency phone numbers on or near all telephones.
Assist customers to safe location during fire.

ATTITUDES

Show concern for safety of employees and customers by following established fire safety program.
Recognize the importance of training employees to use fire extinguishers and fire alarms and to follow fire safety procedures.
Remain calm while evacuating customers and employees from building during fire.
Remain calm while extinguishing small fire.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk to employees, customers and business by following established fire safety procedures.
Reduce risks to employees and customers by training employees in fire safety procedures.
Extinguish fires using only appropriate types of extinguishing materials.
Contact fire department to extinguish fires that are out of control.
Conduct fire drills periodically.

EQUIPMENT AND MATERIALS

Established fire safety procedures
Fire extinguishing materials
Fire alarms
Telephone
Emergency telephone numbers

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.

Physical Development and Health:
- Goal 3-G: Safety procedures at home, workplace, school and recreation sites for the prevention of fires, poisoning, drowning and other accidents.
- Goal 3-I: Appropriate emergency agencies and phone numbers.
- Goal 3-K: Hazardous environmental substances and the efforts to control them.
- Goal 7-B: Rescue skills appropriate to various life-threatening situations.
- Goal 7-C: Essential skills and procedures for use in life-threatening situations.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-I: Roles of the individual in the world of work.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Recognize and correct hazardous conditions

PERFORMANCE STANDARD Business premises and equipment will be inspected, and identified hazards will be corrected.

STEPS

1. Obtain and review copies of local, county, state and federal safety regulations and guidelines.
2. Inspect parking lot and sidewalks for hazards including:
   a. Cracks.
   b. Holes.
   c. Debris.
   d. Slick spots.
   e. Ice and snow.
3. Inspect building for hazards including:
   a. Loose stairs or stair treads.
   b. Crumbling concrete stairs.
   c. Loose railings.
   d. Loose, stuck or broken doors.
   e. Broken, loose or missing ceiling panels.
   f. Leaks in roof.
   g. Frozen or broken water pipes.
   h. Torn or loose floor covering.
   i. Slick spots or water on floors.
   j. Loose, stuck or broken windows.
   k. Inadequate lighting, loose or broken light fixtures and burned-out light bulbs.
   l. Inadequate electrical wiring and outlets.
   m. Broken electrical outlets.
   n. Exposed wiring.
   o. Evidence of rodents or insects.
4. Inspect stockroom and storage areas for hazards, such as:
   a. Loose shelving or fixtures.
   b. Supplies or stock ready to fall.
   c. Cluttered aisles.
   d. Evidence of smoking in no-smoking areas.
   e. Empty cartons or boxes lying around.
   f. Hazardous materials stored incorrectly.
   g. Rags and papers lying around.

STEPS (Cont.)

5. Inspect selling floor and customer service areas for hazards including:
   a. Open drawers.
   b. Counters, displays or fixtures extending into aisles.
   c. Merchandise displays that could fall.
   d. Exposed extension cords.
   e. Evidence of smoking in no-smoking areas.
6. Inspect restrooms for hazards, such as:
   a. Loose or broken fixtures.
   b. Water on floor.
   c. Debris on floor.
   d. Smoldering cigarettes.
7. Inspect equipment for hazards including:
   a. Frayed cords.
   b. Broken plugs.
   c. Inappropriate use of extension cords.
   d. Broken or loose parts.
   e. Obstructions.
   f. Debris around equipment.
   g. Hazardous materials around equipment.
8. Inspect trash disposal area for hazards, such as:
   a. Debris not in cans or dumpster.
   b. Incorrect disposal of hazardous materials.
   c. Evidence of rodents.
9. Arrange to have any identified hazardous conditions corrected.

KNOWLEDGE

Identify various types of hazards which may be found on business premises.
Determine who is responsible for correcting hazardous conditions.
Determine frequency of building inspections.
Use equipment manuals to determine frequency of inspection as recommended by manufacturer.
Follow proper storage procedures for stock, supplies, hazardous materials and cleaning supplies.
Use appropriate methods for rodent and insect control.
Follow local, county, state and federal regulations and guidelines for the storage and disposal of hazardous materials.

ATTITUDES

Show concern for customers and employees by correcting hazardous conditions.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk to customers and employees by providing a safe environment.
Reduce risk of lawsuits to business by correcting hazardous conditions.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Copies of local, county, state and federal regulations and guidelines
Equipment manuals

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.

Physical Development and Health:
- Goal 3-G: Safety procedures at home, workplace, school and recreation sites for the prevention of fires, poisoning, drowning and other accidents.
- Goal 3-I: Appropriate emergency agencies and phone numbers.
- Goal 3-K: Hazardous environmental substances and the efforts to control them.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Business Operations

TASK Establish customer service policies and procedures

PERFORMANCE STANDARD Policies and procedures relating to customer service will be written, and copies will be distributed to all employees. Employees will be trained on written policies and procedures periodically.

STEPS

1. Determine areas for which customer service policies and procedures need to be developed, such as:
   a. Returns, exchanges and adjustments.
   b. Sales.
   c. Delivery of merchandise.
   d. Installation of merchandise.
   e. Smoking.
   f. Food and pets.
   g. Dress code.
   h. Business hours.
   i. Wrapping gifts.
   j. Complaints.
   k. Alterations.
   l. Warranties.
   m. Parking.
2. Write policies for each identified area.
3. List customer service activities in each policy area.
4. Write step-by-step procedures for handling each customer service activity.
5. Prepare copies of written customer service policies and procedures for each employee using photocopier.
6. Distribute copies of written customer service policies and procedures to each employee.
7. Train employees on customer service policies and procedures periodically.

KNOWLEDGE

Use terminology, such as policy, procedure, customer service, returns, exchanges, adjustments, guarantees and warranties.
Determine customer services provided by competition.
Keep up to date with legal constraints in setting policies in areas, such as dress code, smoking, food and pets and business hours.
List possible customer service activities.
Locate and use parts of photocopier.

KNOWLEDGE (Cont.)	Provide employee training on customer service policies and procedures. Write legibly when preparing customer service policies and procedures.
ATTITUDES	Recognize the importance of training employees on customer service policies and procedures. Recognize the value of customer services to business. In addition, refer to Employability Skills List.
SAFETY	Comply with local, county, state and federal regulations when establishing customer service policies and procedures. Keep food and beverages away from photocopier and prepared copies of policies and procedures to avoid damage to equipment, electrical shock to operator or having to remake copies. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copies of local, county, state and federal regulations relative to customer services Paper Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures. Goal 3-E: Use of standard written English conventions. Goal 4-A: Clear and expressive speaking. Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Business Operations
TASK	Evaluate business operations
PERFORMANCE STANDARD	Business operations will be evaluated, and action will be taken to improve operations.

STEPS

1. Determine areas of business operation to be evaluated, such as:
    a. Business layout.
    b. Purchasing activities.
    c. Operational policies and procedures.
    d. Building maintenance.
    e. Equipment.
    f. Customer services.
    g. Receiving and marking operations.
    h. Warehouse operations.
    i. Production.
    j. Sales.
    k. Accounting.
2. Determine the problem(s) within each area to be evaluated.
3. Obtain copies of any secondary information which is available for review including:
    a. Company records.
    b. Government data.
    c. Data gathered by private information services.
    d. Data published in business publications.
    e. Data from trade associations.
4. Collect necessary primary information.
5. Organize primary and secondary information.
6. Analyze all data to determine trends, differences, similarities or other facts about findings.
7. Present findings of evaluation so they are easily understood by those who have not been involved in the evaluation.
8. Identify alternative courses of action to be taken as a result of the evaluation.
9. Weigh the costs and benefits of each alternative.
10. Select best course of action.
11. Implement selected activities.

KNOWLEDGE	Use terminology, such as primary information, secondary information, bar graphs and pie charts. Determine types and sources of secondary information needed. Determine types of primary information needed. Determine method(s) for collecting primary information. Add, subtract, multiply and divide whole numbers, percents and fractions using electric/electronic calculator. Locate and use parts of electric/electronic calculator. Prepare tables and/or graphs to present evaluation findings. Use brainstorming techniques to identify alternative actions to be taken. List the costs and benefits of each alternative action.
ATTITUDES	Recognize the importance of involving employees in the evaluation process and the identification and implementation of actions to be taken. Maintain positive attitude of employees while completing evaluation activities. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of business failure through evaluation of business operations and implementation of action plans. Keep food and beverages away from electric/electronic calculator to avoid damage to equipment or electrical shock to operator. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Sources of secondary information Sources of primary information Paper Pen or pencil Electric/electronic calculator
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 4-E: Application of various techniques of graphing.
- Goal 6-E: Interpretation of tables, graphs, charts, arrays, schedules, experiments and surveys reported in media sources.
- Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.
- Goal 6-H: Ability to design and conduct an experiment or survey using sampling.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.
- Goal 7-G: Application of problem-solving procedures to solve or suggest a solution to a given problem.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS
FOR
BUSINESS, MARKETING
AND MANAGEMENT OCCUPATIONS

CLUSTER:	**BUSINESS OWNERSHIP/MANAGEMENT**
OCCUPATION:	**SMALL BUSINESS OWNER/OPERATOR**
Duty Area:	Managing Human Resources

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Determine personnel needs

PERFORMANCE STANDARD The maximum number of employees to be hired will be determined.

STEPS

1. List tasks that are currently performed or need to be performed in business.
2. List strengths and weaknesses for business owner(s) and all current employees.
3. Match strengths and weaknesses of business owner(s) and current employees to identified tasks.
4. List tasks not being completed, tasks that could be completed better, tasks that are being completed but could be more efficiently completed by current or additional employees and tasks that could be completed by less-qualified and/or less costly employees.
5. Determine the number of employees needed to complete these tasks.
6. Prepare a chart to show ideal staffing for business.
7. Compare ideal staffing with current staffing to determine where additional employees are needed.
8. Obtain and review financial statements and projections to determine if staff additions are feasible.
9. Decide to increase staff.

KNOWLEDGE

Identify all tasks that need to be performed by business owner(s) and employees.
Have current staff identify tasks they perform.
Identify strengths and weaknesses of business owner(s) and employees.
Review current business operation to determine need for additional employees.
Prepare a chart of ideal staffing for business.
Match ideal staffing needs with current staffing.
Analyze financial statements and projections.
Project and analyze costs and benefits of adding staff.
Use effective decision-making techniques.

ATTITUDES

Recognize need to provide ample staffing for business.
Maintain positive employee morale by hiring enough staff to meet business needs.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business losses through efficient and effective planning of staff needs.
Plan for seasonal staffing needs.

EQUIPMENT AND MATERIALS

Paper
Pen or pencil
Financial statements and projections

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.
- Goal 7-G: Application of problem-solving procedures to solve or suggest a solution to a given problem.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-B: Sources of information evaluated in terms of selective criteria.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-H: Roles of individuals and/or groups in effecting change.
Goal 5-I: Roles of the individual in the world of work.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Prepare detailed job description for each position

PERFORMANCE STANDARD Job descriptions will be written which clearly spell out the duties, responsibilities, special requirements and conditions of a specific job. Copies of job descriptions will be prepared and provided to appropriate current and prospective employees.

STEPS

1. Determine appropriate job title.
2. Perform job analysis to identify information, such as:
    a. Job duties and responsibilities.
    b. Experience, special skills and education needed.
    c. Essential personal traits.
    d. Equipment to be operated.
    e. Special work conditions and requirements, such as physical, time and travel constraints.
    f. Promotional opportunities.
    g. Hours of work.
    h. Pay.
    i. Equipment or tools to be owned by employee.
3. Write job description for each position in business based on job analysis:
    a. List job title.
    b. List location of job in organization.
    c. Prepare job summary.
    d. List specific duties and tasks performed.
    e. List specific equipment operated.
    f. Show relationship to other jobs.
    g. List essential qualifications (education, experience, personal traits, skills, etc.).
    h. Specify working conditions and special requirements.
4. Date prepared job description.
5. Review final copy of job description to ensure its correctness.
6. Prepare copies of finalized job descriptions using photocopier.
7. Distribute copies of job descriptions to appropriate current employees.
8. Distribute copy of job description to prospective employees.
9. Discuss job description with current and prospective employees.
10. Update job descriptions regularly.

KNOWLEDGE	Use terminology, such as job description, duties, tasks, job title, job analysis, responsibilities and authority. Determine need for small business to establish and prepare written job descriptions. Perform job analysis using methods, such as interviewing current employees, observing employees and having employees list job tasks or keep daily work log. Determine the importance of a detailed job description to business owner(s) and employees. Determine kinds of information to be included in job description. Use resources, such as the Dictionary of Occupational Titles, to identify information to include in job description. Write clearly and legibly when preparing job descriptions. Use photocopier to make copies of job description. Locate and use parts of photocopier. Distribute to and discuss with current and potential employees information contained in job description. Stay current on all laws, regulations and court decisions relative to personnel. Update job descriptions as jobs change.
ATTITUDES	Recognize the importance of detailed job descriptions to the business and employees. Maintain positive employee morale through the development and effective use of job descriptions. Recognize the importance of providing current and prospective employees with copies of job descriptions. In addition, refer to Employability Skills List.
SAFETY	Reduce personnel problems by developing and using detailed job descriptions. Comply with local, state and federal personnel laws. Keep food and beverages away from photocopier and copies of job descriptions to avoid damage to equipment, electrical shock to operator or having to recopy job descriptions. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Paper Pen or pencil Photocopier Resources, such as Dictionary of Occupational Titles
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Develop hiring policies and procedures

PERFORMANCE STANDARD Hiring policies and procedures will be written and will comply with all local, state and federal laws and regulations relative to the hiring of personnel.

STEPS

1. Contact local, state and federal employment offices to determine existence of any laws and regulations governing hiring of personnel for the specific type of business, the number of people employed and the type of work being done.
2. Obtain and review copies of applicable laws and regulations.
3. Contact other successful entrepreneurs to identify hiring policies and procedures they have established.
4. Identify areas for which hiring policies need to be developed, such as:
   a. Non-discrimination in hiring.
   b. Acceptance and maintenance of applications on file.
   c. Recruitment of potential employees.
   d. Testing of potential employees.
   e. Interviewing of potential employees.
5. Write business policies for each identified area.
6. Write step-by-step procedures for policies, as needed.
7. Prepare copies of written hiring policies and procedures using photocopier.
8. Distribute copies of hiring policies and procedures to current and potential employees.
9. Discuss hiring policies and procedures with current and potential employees.

KNOWLEDGE

Determine need for small business to establish hiring policies and procedures.
Determine appropriate government agencies to contact to identify hiring policies which need to be identified and followed.
Determine laws which apply to the business based on type of work done and number of employees.
Stay current on laws, regulations and court decisions affecting the hiring of personnel.
Review information on laws and regulations regarding hiring of personnel.
Determine hiring policies and procedures to be developed.
Write legibly and clearly when developing hiring policies and procedures.

KNOWLEDGE (Cont.)	Use photocopier to prepare written policies and procedures. Locate and use parts of photocopier. Determine the need to discuss hiring policies and procedures with current and potential employees.
ATTITUDES	Build positive employer-employee relations by keeping employees current on hiring policies and procedures. Recognize the importance of complying with local, state and federal laws and regulations relative to the hiring of employees. In addition, refer to Employability Skills List.
SAFETY	Hire appropriate personnel to staff business. Reduce risk of lawsuit by complying with local, state and federal laws and regulations relative to hiring personnel. Keep food and beverages away from photocopier and copies of hiring policies and procedures to avoid damage to equipment, electrical shock to operator or having to recopy policies and procedures. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copies of laws and regulations relative to hiring of personnel Paper Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Human Resources
TASK	Apply hiring policies and procedures
PERFORMANCE STANDARD	Established hiring policies and procedures will be followed when hiring new employees.
STEPS	1. Determine that new employee(s) are needed. 2. Identify established policies and procedures which should be applied. 3. Obtain and review copies of hiring policies and procedures. 4. Follow established step-by-step procedures to hire personnel.
KNOWLEDGE	Determine the need to follow established hiring policies and procedures. Identify local, state and federal laws and regulations which apply to the hiring of employees. Stay current on laws, regulations and court decisions affecting the hiring of personnel. Review information on laws and regulations regarding hiring of personnel. Identify established policies and procedures applicable to hiring of personnel. Review and follow identified policies and procedures.
ATTITUDES	Maintain positive employee morale by following established hiring policies and procedures. Recognize the importance of complying with local, state and federal laws and regulations relative to the hiring of employees. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of lawsuits by complying with local, state and federal laws and regulations relative to hiring personnel.
EQUIPMENT AND MATERIALS	Copies of local, state and federal laws, regulations and court decisions relative to hiring personnel Copies of established hiring policies and procedures

SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-I: Roles of the individual in the world of work. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Human Resources
TASK	Comply with state and federal laws for hiring
PERFORMANCE STANDARD	All state and federal laws related to hiring of personnel will be complied with each time a new employee is hired.
STEPS	1. Contact federal and state agencies, such as the following, to determine applicable laws and regulations related to the hiring of personnel: a. United States Department of Labor. b. Illinois Department of Labor. c. Equal Employment Opportunities Commission. 2. Obtain and review copies of applicable laws and related regulations. 3. Determine applicability of laws and regulations for specific type of business, type of work being done and number of employees. 4. Apply all laws and regulations when hiring new employees.
KNOWLEDGE	Determine need for small business to comply with state and federal laws and regulations when hiring new personnel. Identify state and federal government agencies that regulate the hiring of employees. Apply laws, such as the Child Labor Laws, Civil Rights Act of 1964, Age Discrimination in Employment Act, Equal Pay Act, Vocational Rehabilitation Act and Fair Labor Standards Act. Stay current on state and federal laws, regulations and court decisions which affect the hiring of employees.
ATTITUDES	Recognize that laws and regulations affecting the hiring of employees are for the protection of a business and its employees. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of lawsuits and financial losses by complying with federal and state laws related to the hiring of personnel.
EQUIPMENT AND MATERIALS	Copies of federal and state laws and regulations relating to the hiring of personnel

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Recruit employees

PERFORMANCE STANDARD Recruitment method(s) will be selected; and job opening will be publicized in accordance with all local, state and federal laws and regulations regarding recruitment of employees.

STEPS

1. Review classified ads for similar positions to determine job qualifications, salary, etc.
2. Determine the following prior to beginning recruitment activities:
   a. Whether to have applicants call, send in a resume or apply in person.
   b. Specific qualifications needed by employee.
   c. What salary and benefits will be provided new employee and how negotiable they are.
   d. How much to spend to recruit employee.
3. Select most appropriate method(s) of or source(s) for recruiting employees, such as:
   a. Classified ads.
   b. Private employment agencies.
   c. Government agencies.
   d. Placement offices at schools.
   e. Churches and synagogues.
   f. Filed applications.
   g. Current employees.
   h. Friends and relatives.
   i. Temporary agencies.
   j. Posted signs in neighborhood or business.
4. Compile information about available job to use to recruit employees.
5. Develop materials to be used to recruit employees based on method(s) or source(s) selected.
6. Review developed materials to ensure accuracy of content and compliance with all federal, state and local laws and regulations.

KNOWLEDGE Use terminology, such as recruitment, open ads and blind ads.

Contact sources for potential employees, such as private employment agencies; temporary agencies; government agencies (Illinois Job Service); placement offices at universities, community colleges, area vocational centers and secondary schools; churches or synagogues and temporary agencies.

KNOWLEDGE (Cont.)

Maintain file of applications from walk-in applicants.
Notify current employees, friends and relatives of job opening to identify potential employees.
Weigh the costs and benefits of each method of recruiting employees.
Determine advantages and disadvantages of each method of recruitment.
Determine why current employees, friends and family are not always the best sources for identifying potential employees.
Identify qualifications needed for available position.
Determine salary range for position.
Determine how much business can afford to spend on recruitment activities.
Identify steps to be taken to recruit employees using selected method(s).
Write legibly and clearly when developing recruitment materials.
Proofread all recruitment materials to ensure accuracy of content.
Write classified ads.
Prepare help wanted signs.
Stay current on local, state and federal laws, regulations and court decisions regarding the recruitment of employees.

ATTITUDES

Recognize that employees make or break the business.
Use a variety of recruiting methods.
In addition, refer to Employability Skills List.

SAFETY

Reduce the costs of hiring and training employees through the use of effective recruitment methods.
Comply with local, state and federal laws and regulations when recruiting employees.

EQUIPMENT AND MATERIALS

Classified ads
Paper
Pen or pencil
Materials to make help wanted signs
Copies of local, state and federal laws, regulations and court decisions regarding recruitment of employees

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 6-D: English grammar.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Select job applicants for interviews

PERFORMANCE STANDARD Applications and/or resumes will be screened using legal criteria, and top candidates will be selected for interviews.

STEPS

1. Have each applicant complete an application form and/or submit a current resume.
2. Determine number of applicants to be interviewed personally.
3. Establish minimum legal qualifications for screening applications.
4. Review each application and/or resume, and apply established screening criteria.
5. Separate qualified applications and/or resumes from those of applicants who are not qualified.
6. Rank all qualified applicants from most qualified to least qualified.
7. Contact top-ranked applicants to arrange for a personal interview.

KNOWLEDGE

Determine need to screen applicants and/or resumes.
Establish a reasonable number of applicants to interview.
Determine minimum qualifications for job to be used as criteria to screen applicants.
Apply screening criteria.
Rank all qualified applicants from most to least qualified.
Arrange personal interviews for top candidates.
Stay current on all local, state and federal laws, regulations and court decisions affecting the selection of employees.

ATTITUDES

Recognize that employees make or break the business.
Recognize the need to hire the best qualified people.
In addition, refer to Employability Skills List.

SAFETY

Reduce the costs of hiring and training employees through the use of effective application screening process.
Comply with local, state and federal laws and regulations when screening applicants.

EQUIPMENT AND MATERIALS	Completed application forms and/or resumes from potential employees Paper Pen or pencil Copies of local, state and federal laws, regulations and court decisions regarding the hiring of personnel
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-I: Roles of the individual in the world of work. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Conduct job interview

PERFORMANCE STANDARD Job interview will be used to evaluate applicants and identify best applicant for job opening. All federal and state laws and regulations will be followed during the personal interview.

STEPS

1. Schedule personal interviews.
   a. Allow ample time for each interview.
   b. Have applicant come early to complete application form if not previously done and to take any applicable employment tests.
2. Prepare for interview session.
   a. Establish interview objectives.
   b. Prepare a list of interview questions making sure all are legal.
   c. Arrange to use a private, comfortable area for interviewing applicants.
   d. Review established job description.
   e. Review all information available on interviewee (test results, application form, resume, etc.).
   f. Be familiar with applicant's work history, educational background and any special skills and talents.
3. Open the interview.
   a. Greet applicant.
   b. Put applicant at ease.
   c. Offer coffee, soft drink, etc.
   d. Make small talk to begin.
4. Question applicant using prepared questions.
   a. Ask open-ended questions.
   b. Encourage applicant to talk.
   c. Ask follow-up questions to clarify responses.
   d. Do not discuss information, such as address, age, criminal record, disability, marital status, national origin, physical capabilities, race, religion or sex.
   e. Listen carefully to responses.
   f. Take notes on responses.
   g. Observe applicant.

STEPS (Cont.)

5. Provide job-related information to applicant.
    a. Provide copy of job description.
    b. Provide information, such as job requirements, salary, fringe benefits, promotion and growth opportunities and supervisory or authority relationships.
6. Provide opportunity for questions from applicant.
7. Close interview.
    a. Summarize or clarify major points.
    b. Ask final questions.
    c. Ask applicant for final questions.
    d. Provide information on what happens next.
    e. Thank applicant.
    f. Escort applicant from room or office.
8. Write interview summary and evaluation.

KNOWLEDGE

Prepare schedule for interviewing applicants.
Determine skills which are needed on the job for which tests can be given.
Select tests which will accurately measure skills needed on the job.
Determine objectives for interview.
Prepare open-ended questions to use during interview.
Identify information which should not be requested during an interview.
Review resume and/or application prior to interview.
Review results of any applicable employment tests.
Identify method(s) to put applicant at ease.
Arrange for a private, comfortable area for interview.
Listen carefully to responses to determine how something is said, what is not said, whether applicant is really interested in position and if direct answers are given to questions.
Take notes during interview, but do so unobtrusively.
Observe applicant for things, such as appropriate dress, cleanliness and neatness, tone of voice, signs of smoking, personality, eye contact, signs of nervousness, annoying mannerisms and enthusiasm for position.
Determine appropriate information to provide applicant about job.
Respond to applicant's questions directly and honestly.
Close interview on a positive note.
Evaluate each applicant directly after interview.
Write legibly and clearly when evaluating potential employees.
Stay current on local, state and federal laws, regulations and court decisions regarding the interviewing of potential employees.

ATTITUDES

Recognize importance of conducting effective interviews.
Display honesty throughout interview.
Maintain positive attitude throughout interview.
Show consideration for applicant by trying to put her/him at ease.
In addition, refer to Employability Skills List.

SAFETY	Reduce the costs of hiring and training employees through the use of effective interviewing techniques. Comply with state and federal laws and regulations when conducting job interviews. Ensure hiring the best-qualified personnel by using effective interviewing techniques.
EQUIPMENT AND MATERIALS	Completed application forms and/or resumes from potential employees Employment test results Job description Copies of federal, state and local laws, regulations and court decisions on interviewing Paper Pen or pencil
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 4-A: Clear and expressive speaking. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-I: Roles of the individual in the world of work. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Select employees

PERFORMANCE STANDARD New employee(s) hired will be those best qualified for the position, and interviewees not hired will be notified of the hiring decision.

STEPS

1. Sort files of materials for interviewed applicants into a group to be considered for employment and a group that will not be considered.
2. Review information in applicant's file, such as notes taken during the interview, evaluative comments written immediately following the interview, results of tests taken by applicant and application form and/or resume.
3. Contact listed references for applicants being considered.
4. Contact former employers and schools listed on application form to confirm accuracy of information.
5. Rank interviewed applicants based on all information in interview file.
6. Select top candidate for employment.
7. Contact selected applicant, and extend job offer.
8. Obtain acceptance of job offer and starting date from selected applicant.
9. Write letter to follow up on job offer.
10. Call or write unsuccessful applicants to notify them of the final decision.
11. Maintain file of all applicants for future use.
12. Schedule start date and orientation for new employee.

KNOWLEDGE

Assemble information obtained during personal interview, resume and/or application form and any test data in file folder for use in evaluating potential employees.

Evaluate information contained in applicant's file folder based on job needs.

Develop appropriate questions to ask contacted references, former employers and schools.

Rank applicants based on all data rather than one or two pet factors, such as grades in school or appearance.

Call selected applicant.

Be specific when making job offer by providing information, such as salary and start date.

Write letter to follow up on job offer.

KNOWLEDGE (Cont.)	Write positive letters of rejection to those applicants not hired, or call applicants who were not hired. Send out rejection letters or make rejection calls only after desired candidate has accepted job offer. Have letters typed using a typewriter or prepared using microcomputer. Maintain files of potential employees. Apply alphabetic filing system.
ATTITUDES	Recognize the importance of contacting applicants who were not selected for employment. Show positive attitude when contacting applicants who were not hired. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of employee dissatisfaction by being specific when making job offer. Keep food and beverages away from equipment and copies of prepared letters to avoid damage to equipment, electrical shock to operator or having to redo letters. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Files containing information on interviewed applicants Telephone Business letterhead Typewriter or microcomputer with printer
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-C: Use of specific information or reasons to support and elaborate the main point. Goal 3-E: Use of standard written English conventions. Goal 3-F: Ability to revise, edit and proofread. Goal 4-A: Clear and expressive speaking. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-I: Roles of the individual in the world of work.

Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Conduct employee orientation

PERFORMANCE STANDARD The employee orientation program will be well planned and well developed and will familiarize new employee(s) with business operation.

STEPS

1. Plan and develop orientation activities.
2. Review all materials prior to orientation session.
3. Organize forms and other materials for each new employee.
4. Greet and welcome new employee(s).
5. Introduce new employee(s) to co-workers.
6. Show employee to assigned work station.
7. Distribute the following types of printed materials about company to new employee(s):
   a. Pamphlets.
   b. Brochures.
   c. Newsletters.
   d. Articles.
   e. Organization chart.
   f. Prepared handouts.
8. Discuss company history, successes, products, services and organization with new employee(s).
9. Take new employee(s) on tour of business being sure to point out:
   a. Employee lounge.
   b. Rest rooms.
   c. Lunch, break or smoking areas.
   d. Equipment and supply storage areas.
   e. Stockroom.
   f. Emergency exits.
   g. Fire extinguishers.
10. Assist new employees in filling out necessary forms including:
    a. Tax forms (FICA, federal income tax, Illinois income tax and city income tax).
    b. Insurance forms (medical, dental and life).
    c. Time record forms.
    d. Direct deposit of pay forms.
11. Give new employee(s) copy of company policies and procedures manual or prepared handouts on company policies and procedures.

STEPS (Cont.)

12. Discuss with new employee(s) the following types of work-related information:
    a. Job description.
    b. Work standards.
    c. Pay periods.
    d. Method(s) of payment.
    e. Work policies (dress code, personal telephone calls, attendance, tardiness, smoking, eating and drinking, lunch hours and rest breaks).
    f. Education and training programs.
    g. Promotion policies and opportunities.
    h. Evaluation systems and forms.
    i. Employment services (credit union, gift or flower fund, company-sponsored socials, awards, recreation programs, bulletin boards and employee counseling).
    j. Employee benefits (vacations, sick leave, funeral leave, holidays, discounts and profit sharing).
    k. Safety and accident prevention (fire exits, accident reporting and legal aspects).
    l. Termination policies (permanent dismissal, layoffs, recalls, number of days required to notify if quitting and exit interview).
    m. Handling theft (internal and external).
13. Conduct question and answer session.
14. Assign new employee to co-worker for planned observation and training.

KNOWLEDGE

Use terminology, such as orientation, policies, procedures, FICA, evaluation, employee services, employee benefits and termination.
Determine need to orient new employee(s).
Outline information to provide new employee(s) during orientation.
Organize materials to be provided to new employee(s).
Develop new handouts for employee(s) if printed materials are unavailable.
Write orientation materials so they are easy to read and understand.
Determine forms to be completed by new employee(s).
Assist new employee(s) in completing forms.
Write legibly when completing all forms.
Explain company policies and procedures to new employee(s).
Respond directly and appropriately to employee questions.
Set aside adequate time for orientation so it is not rushed.
Use language new employee(s) will understand rather than business jargon.

ATTITUDES

Emphasize to new employee(s) that it is important to ask questions.
Recognize that well-planned and well-organized orientation programs lead to increased productivity, heightened morale, better employee loyalty, reduced costs and less turnover.

ATTITUDES (Cont.)

Capitalize on new employee enthusiasm by providing immediate and effective orientation.
Recognize that most new employees are eager and excited about the new job and want to make a good impression.
Complete employee benefit and tax forms accurately and in a timely manner.
In addition, refer to Employability Skills List.

SAFETY

Reduce cost of employee dissatisfaction, low productivity and turnover through well-planned and well-developed orientation activities.

EQUIPMENT AND MATERIALS

Company policies and procedures manual
Federal, state and local tax forms
Insurance forms
Time record forms
Direct deposit of pay forms
Prepared handouts on company

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 3-F: Ability to revise, edit and proofread.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:
- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Train employees

PERFORMANCE STANDARD All employees will be trained to perform job so job performance will meet established performance standards.

STEPS

1. Determine training needs of new and current employees.
    a. Determine skills possessed by new and current employees.
    b. Obtain and review job description to determine skills needed to perform the job.
    c. Analyze employee evaluations to determine performance problems.
    d. Compare skills needed with those that employees currently have to determine training needs.
    e. Prioritize training needs based on company objectives and goals, budgets and time commitments.
    f. Determine number of employees who need prioritized training.
2. Plan prioritized training program.
    a. Determine objectives of program.
    b. Develop instructional outline.
    c. Determine who will provide training.
    d. Determine training and evaluation method(s).
    e. Determine equipment and supplies to be used during training.
    f. Select training location.
    g. Schedule training program.
    h. Notify employees of training program.
3. Prepare instructional activities, materials and evaluation instruments.
4. Assemble equipment, supplies and instructional materials to be used during training program.
5. Conduct dry run of training program.
6. Revise training program based on feedback received during dry run.
7. Present actual training program.
8. Evaluate trainees' performance and document that performance.
9. Inform trainees of progress.
10. Place training documentation in employee's personnel file.
11. Provide remedial training if needed.
12. Have trainees evaluate training program.

STEPS (Cont.)

13. Evaluate training program to determine:
    a. Whether training program met established objectives.
    b. Whether training resulted in learning.
    c. Whether method(s) used were effective.
    d. Whether cost of training was worth the result.
14. Revise training program as needed.

KNOWLEDGE

Use terminology, such as inexperienced personnel, new experienced personnel, experienced personnel, lecture, discussion, demonstration, sponsor, role playing, case study, brainstorming, programmed instruction, on-the-job training, job rotation, coaching, follow-up, systems training, updating, upgrading, evaluation and dry run.
Determine need for small business to provide employee training.
Determine tasks to be completed by employees.
Determine satisfactory performance standards.
Determine problems encountered by employees in completing job tasks.
Develop clear and measurable objectives for training program.
Select most appropriate person(s) to conduct training program.
Determine costs and benefits of each method of providing employee training.
Select most cost-effective method(s) for providing employee training.
Select training location away from work station, if possible.
Write clearly when preparing training materials.
Conduct dry run of training program for selected employees to ensure that essential information is covered.
Use sources, such as the Small Business Administration, trade associations, local educators and publishing companies, to identify effective materials to use during training.
Use effective training techniques when providing training activities.
Evaluate training activities using formal written or verbal tests, by observing employee or by checking completed work.
Prepare evaluation instruments which are clear and which quickly evaluate the effectiveness of the training program and the progress of the trainees.
Reinforce formal training by following up with trainees.
Use alphabetic or numeric filing system.

ATTITUDES

Recognize the importance of well-trained employees to business.
Keep employee morale high by providing appropriate and effective training and by providing additional training as needed.
Reduce worker turnover through effective training activities.
Increase customer satisfaction and company loyalty through well-trained employees.
Show patience when training employees.
Offer encouragement during training activities.
In addition, refer to Employability Skills List.

SAFETY	Increase profitability of business by providing effective and appropriate training.
EQUIPMENT AND MATERIALS	Employees needing training Training materials based on specific training activity Training equipment based on materials being used Paper Pen or pencil Personnel files
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-B: Ability to develop and maintain a focus with a clear thesis, a main idea, theme or unifying event. Goal 3-C: Use of specific information or reasons to support and elaborate the main point. Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures. Goal 3-E: Use of standard written English conventions. Goal 3-F: Ability to revise, edit and proofread. Goal 4-A: Clear and expressive speaking. Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Schedule employees

PERFORMANCE STANDARD Work schedule will be prepared to meet business staffing needs; company policies and union, local, state or federal labor regulations.

STEPS

1. Determine work hours (weekly or monthly) to be scheduled and work tasks to be completed.
2. Establish number of employees needed to complete identified tasks considering peak and low business hours and seasons.
3. Determine number of hours each employee can or must work and any restrictions in those hours.
4. Check vacation/leave schedule to ensure that scheduled employees are not on vacation or leave.
5. Prepare chart to show work schedule allowing for breaks as needed.
6. Review work schedule to ensure that company policies have been met; union, local, state and federal labor regulations have been followed; business hours have been adequately covered; all available employees have been scheduled and consideration has been given for special requests.
7. Prepare copies of work schedule for each employee using photocopier.
8. Distribute work schedule to each employee and discuss if needed.
9. Post work schedule.

KNOWLEDGE

Determine tasks to be completed during work week.
Determine if work week being scheduled falls within a peak business season, such as holiday season.
Determine the number of hours each employee can or must work and any restrictions in these hours, such as school schedules.
Determine which employees are on vacation or other leave.
Establish policy for switching hours between employees.
Draw a chart to show the work schedule.
Write legibly when preparing work schedule.
Locate and use parts of photocopier.
Post work schedule in convenient location.

ATTITUDES	Display flexibility when preparing work schedule to try to meet special needs of workers. Assist employees who need to change scheduled work hours. In addition, refer to Employability Skills List.
SAFETY	Comply with local, state and federal labor laws when scheduling employees. Reduce business costs by scheduling adequate employee coverage during peak periods and reducing employee coverage during slow periods. Keep food and beverages away from photocopier and copies of work schedule to avoid damage to equipment, electrical shock to operator or having to recopy work schedule. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copy of union, local, state and federal labor regulations Copy of vacation/leave schedule Paper Pen or pencil Ruler or straightedge Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 4-A: Clear and expressive speaking. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar. Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-G: Ways to utilize the various levels of government.
Goal 5-I: Roles of the individual in the world of work.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Human Resources
TASK	Delegate responsibility and authority to employees
PERFORMANCE STANDARD	Responsibility for performance of activities and authority to perform activities will be delegated to employees, and employees will be allowed to exercise delegated authority.
STEPS	1. Obtain and review copy of organization chart to assist in the identification of areas of responsibility and lines of authority. 2. Define and write areas of responsibility to be delegated to employees. 3. Assign areas of responsibility to specific employees. 4. Define and write tasks within each area of responsibility for which employee will be held accountable. 5. Establish and write performance standards for each task. 6. Establish and write limits of authority for each task. 7. Assign tasks and corresponding authority to employees. 8. Make copies of written areas of responsibility, authority limits and tasks for each employee using photocopier. 9. Distribute copies of areas of responsibility, authority limits and tasks to employees. 10. Discuss areas of responsibility, authority limits and tasks with appropriate employees. 11. Provide employees with opportunities to exercise delegated authority and to perform assigned tasks.
KNOWLEDGE	Determine need to assign responsibility for accomplishing job tasks and delegating the corresponding authority to employees. Determine areas of responsibility for which authority should be delegated to others. Determine tasks within each area of responsibility that should be completed by employees. Determine performance standards for each identified task. Determine the amount of authority each employee should have for each identified task. Write clearly and legibly when preparing list of areas of responsibility, authority limits and tasks. Locate and use parts of photocopier.

ATTITUDES	Require employees to exercise assigned authority. Recognize the importance of delegating responsibility and authority and allowing employees to exercise the delegated authority. Hold employees accountable for delegated tasks. In addition, refer to Employability Skills List.
SAFETY	Increase employee job satisfaction by allowing employees to exercise delegated authority. Monitor employee activities to ensure that delegated authority is being honestly used. Keep food and beverages away from photocopier and printed copies of employee responsibilities to avoid damage to equipment, electrical shock to operator or having to recopy information. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Copy of organization chart Paper Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures. Goal 3-E: Use of standard written English conventions. Goal 4-A: Clear and expressive speaking. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

Goal 3-B: Selected principles of learning and motivation.
Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-B: Sources of information evaluated in terms of selective criteria.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-H: Roles of individuals and/or groups in effecting change.
Goal 5-I: Roles of the individual in the world of work.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Human Resources
TASK	Counsel employees
PERFORMANCE STANDARD	Employee counseling will be provided as personal or work-related problems are identified.
STEPS	1. Determine that an employee has a personal or work-related problem. 2. Schedule time to discuss problem with employee. 3. Arrange private place for discussion. 4. Allow employee to talk. 5. Ask probing (open-ended) questions until all facts are clear and fall into place. 6. Assist employee in defining problem and finding solution. 7. Discuss effects of problem on productivity and other employees. 8. Conclude meeting within reasonable amount of time. 9. Follow up with employee on problem.
KNOWLEDGE	Determine need to counsel employee. Apply good listening skills. Apply problem-solving skills. Apply probing (open-ended) questioning techniques. Watch for and point out contradictions in facts provided by employee. Encourage employee to identify own solution rather than providing advice or solution. Limit time involved in counseling employee. Recognize personal counseling limitations. Determine if employee needs additional counseling. Refer employee to agencies, such as family counseling centers, mental health clinics, Alcoholics Anonymous and certified financial counselors.
ATTITUDES	Respect your own time limitations when counseling employees. Listen patiently to employee. Assist employee in solving problem. Display nonjudgmental attitude when counseling employee. Avoid lecturing or moralizing when counseling employee. Show concern when counseling employee. Avoid arguing with employee when counseling her/him. In addition, refer to Employability Skills List.

SAFETY	Avoid arguing, providing a solution, criticizing, moralizing, getting upset, appearing disinterested, throwing up hands in despair or antagonizing employee during counseling session.
EQUIPMENT AND MATERIALS	Employee needing counseling Private meeting room
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar. Social Sciences: Goal 3-B: Selected principles of learning and motivation. Goal 3-G: Selected types of antisocial behavior and various methods of intervention. Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system. Goal 5-G: Ways to utilize the various levels of government. Goal 5-I: Roles of the individual in the world of work. Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Establish criteria and procedures for evaluating employees

PERFORMANCE STANDARD Criteria for evaluating employees will be based on established job description. Criteria and procedures for evaluating employees will be clearly written and provided to employees.

STEPS

1. Establish procedures for evaluating personnel, such as:
   a. Types of appraisals--developmental or compensation.
   b. Methods of appraisal.
   c. Frequency of developmental or compensation evaluations.
   d. Scheduling of developmental or compensation evaluations.
   e. Conducting evaluation conferences.
2. Establish criteria for evaluating personnel.
   a. Obtain and review copies of job descriptions.
   b. Establish employee performance goals (standards).
3. Develop performance appraisal instrument based on established job tasks and performance goals (standards).
4. Establish regular evaluation schedule.
5. Prepare copies of evaluation procedures, evaluation criteria and performance appraisal instrument using photocopier.
6. Distribute copies to all employees.
7. Discuss evaluation criteria and procedures with employees.

KNOWLEDGE

Determine importance of performing developmental and compensation evaluations at different times.

Determine differences between developmental and compensation evaluations.

Select method(s) to use when evaluating employees, such as ranking, grading, graphic scales, checklists, forced choice description, behaviorally anchored rating scales (BARs) or essay description.

Determine how frequently developmental evaluations should be performed.

Determine how frequently compensation evaluations should be performed.

Determine criteria for evaluating personnel from job description.

Develop performance appraisal instrument.

Set up a schedule for evaluating personnel and conducting evaluation conferences.

Write clearly and legibly when preparing evaluation procedures, evaluation criteria and performance appraisal instrument.

KNOWLEDGE (Cont.)	Locate and use parts of photocopier. Ensure that all employees are made aware of evaluation criteria, procedures and methods.
ATTITUDES	Work with each employee to set reasonable performance goals (standards) for him/her. Answer questions directly and honestly when explaining evaluation information. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of lawsuits on discrimination by establishing a fair and reasonable evaluation system. Keep food and beverages away from photocopier and prepared copies to avoid damage to equipment, electrical shock to operator or having to remake copies. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Established job descriptions Paper Pen or pencil Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 4-A: Clear and expressive speaking. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 7-A: Rounding numbers.

Social Sciences:

- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Human Resources
TASK	Evaluate employee performance
PERFORMANCE STANDARD	Each employee will be evaluated periodically, results of evaluation will be discussed with employee and each employee will be provided with a copy of the written evaluation. Developmental and compensation evaluations will be conducted at different times.

STEPS

1. Determine type of evaluation being performed:
   a. Developmental evaluation.
   b. Compensation evaluation.
2. Perform developmental evaluation:
   a. Schedule developmental evaluation conference.
   b. Tell employee purpose of conference.
   c. Observe employee performance and evaluate based on established job duties and tasks.
   d. Document positive and negative work activities between evaluations.
   e. Prepare written employee evaluation which includes recommendations, corrective actions and possible re-evaluations.
   f. Prepare copy of written evaluation for employee using photocopier.
   g. Conduct employee developmental evaluation conference.
   h. Set goals (standards) for employee improvement.
   i. Reinforce positive aspects of employee's performance.
   j. Give employee opportunity to respond to evaluation.
   k. Set date for next developmental evaluation and note in personnel file.
   l. Have employee sign evaluation to show he/she has read it.
   m. Prepare copy of signed evaluation for employee's records using photocopier.
   n. Give copy of signed evaluation to employee.
   o. File original copy of signed evaluation in employee's personnel file.
   p. Document employee developmental evaluation conference and place in employee's personnel file for future reference.

STEPS
(Cont.)

3. Perform compensation evaluation:
    a. Schedule compensation evaluation conference.
    b. Tell employee purpose of conference.
    c. Determine if employee will receive a raise and the amount of the raise.
    d. Document amount of raise, reasons for the raise or reasons for no raise.
    e. Conduct employee compensation evaluation conference.
    f. Set date for next compensation evaluation and note in employee's personnel file.
    g. Document employee compensation evaluation conference and place in employee's personnel file for future reference.

KNOWLEDGE

Determine importance of performing developmental and compensation evaluations at different times.
Use job description as basis for developmental evaluation.
Determine tasks to be performed by each employee and the standards of performance.
Determine job tasks which are being performed at or above established criteria and those which need improvement.
Conduct evaluation conference in private setting.
Write clearly and legibly when preparing employee evaluation and when documenting evaluation conference.
Locate and use parts of photocopier.
Review established job tasks and how well they should be performed with employee.
Discuss importance of each task with employee.
Provide feedback on task performance to employee.
Discuss both positive and negative performance of job tasks with employee.
Establish realistic goals for improvement of performance of job tasks.
Provide employee with opportunity to respond to evaluation.
Establish date with employee to conduct next developmental or compensation evaluation.
Determine need to note date of developmental or compensation evaluation in employee personnel file.
Ask employee to sign evaluation.
Provide employee with copy of signed evaluation.
Use alphabetic filing system.
Determine importance of keeping signed employee evaluation in employee personnel file.
File original copy of signed evaluation for future reference.
Establish criteria for providing raises to employees based on job performance.
Tell employee at beginning of compensation evaluation conference if she/he will or will not receive a raise.
Explain reasons for giving or not giving employee a raise.
Document all employee evaluation conferences.
Maintain documentation in employee's personnel file.
Stay current on all local, state and federal laws, regulations and court decisions regarding the evaluation of employees.

ATTITUDES	Document evaluation conferences accurately and in a timely manner. Answer questions directly and honestly during evaluation conference. Focus on achievement of tasks during evaluation conference. Respond to employee problems honestly. Work with each employee to set reasonable goals (standards) for him/her. Apply guidelines for granting salary increases fairly and consistently. Show sensitivity to employee's feelings during evaluation conference. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of lawsuits by maintaining documentation of employee evaluations and evaluation conferences in personnel files. Keep food and beverages away from photocopier and copies of evaluation reports to avoid damage to equipment, electrical shock to operator or having to recopy evaluation reports. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Blank evaluation forms (developmental and compensation) Established job description and evaluation criteria Pen or pencil Paper Photocopier Private location for holding evaluation conference Personnel files Copies of local, state and federal laws and regulations and court decisions on personnel evaluation
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Discipline employees

PERFORMANCE STANDARD Disciplinary action will be taken and documented as incidents occur, and documentation will be maintained in individual employee's personnel file.

STEPS

1. Investigate reports of or observe employee breaking company rules, not working to employer's expectations or interfering with the work of other employees.
2. Write down observed or reported behavior, date of occurrence and any other pertinent information.
3. Schedule disciplinary conference with employee.
4. Explain observation to employee and reasons for concern.
5. Listen to employee's explanation.
6. Ask probing questions to obtain more information, if needed.
7. Discuss specific changes which need to be made.
8. Set date for follow-up meeting.
9. Document disciplinary conference, and place documentation in employee's personnel file.
10. Observe employee to determine if behavior has changed.
11. Conduct follow-up conference to discuss positive changes in behavior or disciplinary action to be taken.
12. Document follow-up conference, and place documentation in employee's personnel file.

KNOWLEDGE

Establish company work rules and penalties for breaking them.
Explain work rules and penalties to all employees.
Determine need to hold a disciplinary conference with employee.
Determine need to document employee action which requires disciplinary action.
Deal with problems as they occur.
Investigate disciplinary problems thoroughly prior to taking action.
Explain how problem behavior adversely affects business and other employees.
Conduct corrective conference in private setting.
Listen objectively to employee's explanation of behavior.
Involve employee in identifying behavioral changes which need to be made.
Ask probing questions to clarify employee action.
Keep discussion focused on productive issues.
Note any positive changes in employee's behavior.

KNOWLEDGE (Cont.)

Determine action to be taken if employee's behavior does not change.
Use alphabetic filing system.
Write clearly and legibly when documenting disciplinary conference.
Stay current on local, state and federal laws, regulations and court decisions regarding the disciplining of employees.

ATTITUDES

Document disciplinary conference accurately and in a timely manner.
Remain calm when disciplining employees.
Focus on behavior that needs to be changed rather than on the person.
Display respect for employee by being fair, specific and firm during disciplinary conference.
Take corrective action immediately.
Enforce rules or policies consistently.
Assume a normal attitude toward employee once disciplinary action has been taken.
Show concern for employee's feelings during disciplinary conference.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of lawsuit by maintaining documentation of all disciplinary conferences in employee's personnel file.
Reduce risk of employee dissatisfaction by consistently enforcing company rules and policies.
Comply with all local, state and federal laws, regulations and court decisions regarding the disciplining of employees.

EQUIPMENT AND MATERIALS

Established company rules and policies
Pen or pencil
Paper
Private location for holding disciplinary conference
Personnel files
Copies of local, state and federal laws, regulations and court decisions regarding the disciplining of employees

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 3-B: Selected principles of learning and motivation.
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-H: Roles of individuals and/or groups in effecting change.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Discharge employees

PERFORMANCE STANDARD Employees who need to be terminated will be dismissed following established company procedures.

STEPS

1. Determine that employee must be discharged.
2. Review appropriate company procedures for discharging employees.
3. Review all documentation in employee's personnel file.
4. Conduct employee dismissal conference:
    a. Arrange for private location.
    b. Hold meeting at end of day and at end of week.
    c. Inform employee of dismissal.
    d. Provide employee with opportunity to respond.
5. Arrange for final payment to employee, including any accrued benefits.
6. Obtain keys, identification card and other company property from employee.
7. Document dismissal conference.
8. Place documentation in employee's personnel file for future reference.

KNOWLEDGE

Determine behavior(s) for which employees will be discharged.
Determine that appropriate alternative actions have been taken prior to discharging employee.
Establish company procedures for discharging employees.
Follow company procedures for discharging employees.
Document disciplinary incidents as they occur to ease the ability to terminate employees.
Obtain and review documentation from employee's personnel file to prepare for dismissal conference.
Pay employee for all time worked plus any accrued benefits, such as vacation days.
Determine reasons to arrange for private location to hold dismissal conference.
Determine reasons to dismiss employee at end of day and at end of week.
Provide employee with reasonable explanation of why dismissal action has been taken.
Listen objectively to any response from employee.
Obtain all company property from employee, such as keys, identification cards, equipment and supplies.

KNOWLEDGE (Cont.)	Write legibly and clearly when documenting dismissal conference. Use alphabetic filing system. Determine need to maintain documentation of dismissal conference in employee's personnel file. Determine need to keep dismissed employee's personnel file for future reference. Determine how long to keep dismissed employee's personnel file.
ATTITUDES	Document termination conference accurately and in a timely manner. Apply employee termination policies consistently. Focus dismissal conference on cause for termination. Remain calm during dismissal conference. Conduct dismissal conference fairly. Show sensitivity for employee's feelings during dismissal conference. In addition, refer to Employability Skills List.
SAFETY	Comply with all local, state and federal government; company and union regulations when dismissing employees. Reduce risk of lawsuit for discrimination by thoroughly documenting facts when terminating employees. Retain terminated employee's personnel file for future reference if a lawsuit should be filed or if the employee files for unemployment compensation.
EQUIPMENT AND MATERIALS	Documentation of previous disciplinary action Personnel file for employee Private location for holding dismissal conference Paper Pen or pencil Copies of local, state and federal laws, regulations and court decisions regarding the termination of employees
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 4-A: Clear and expressive speaking. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Establish system of salaries, commissions, bonuses and quotas

PERFORMANCE STANDARD System of salaries, commissions, bonuses and quotas will be established and communicated to all employees.

STEPS

1. Review any local, state and federal labor laws which affect the establishment of salaries, such as the Fair Labor Standards Act.
2. Analyze the advantages and disadvantages of various compensation plans, including:
    a. Straight salary.
    b. Salary and commission.
    c. Quota.
    d. Straight commission.
    e. Straight commission with drawing account.
    f. Premium money (PM).
    g. Profit sharing.
    h. Bonus.
    i. Piece-rate.
    j. Group incentive.
3. Eliminate any compensation plan(s) that are not appropriate for business.
4. Compare the costs and benefits of the remaining compensation plans.
5. Select the most effective compensation plan for each job.
6. Determine relative importance of each job based on the contribution to the business.
7. Set base salary, commission or bonus percentages or amounts and quota levels for each job or each employee.
8. Discuss applicable compensation plan with each employee.
9. Place copy of applicable compensation plan in employee file.

KNOWLEDGE

Determine need for small business to establish compensation plan.

Use terminology, such as compensation, wages, salaries, straight salary plan, salary and commission plan, quota plan, straight commission plan, supplementary incentive plan, premium money (PM), profit sharing, bonus plan, piece-rate plan, group incentive plan and federal minimum wage.

Identify any local, state and federal labor laws which affect the establishment of salaries in a small business.

KNOWLEDGE (Cont.)

Stay current on all local, state and federal laws, regulations and court decisions regarding the administration of compensation plans.
Determine advantages and disadvantages of each type of compensation plan.
Determine benefits of each type of compensation plan.
Estimate the cost of providing each type of compensation plan.
Discuss compensation plans with other entrepreneurs.
Determine prevailing wage rate in community and industry prior to setting wage or salary rates.
Match compensation plans with appropriate jobs.
Determine the value of each job to the business.
Consider the contributions each employee makes to the business when establishing individual salaries.

ATTITUDES

Administer compensation plan fairly and without discrimination.
Establish compensation plan that satisfies employees' needs and encourages them to do a good job.
In addition, refer to Employability Skills List.

SAFETY

Reduce employee dissatisfaction by fairly administering compensation plan.
Comply with all local, state and federal laws affecting wages and salaries.

EQUIPMENT AND MATERIALS

Copies of local, state and federal labor laws
Pen or pencil
Paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Mathematics:

Goal 1-A: Ability to read, write and name numbers in several different ways.
Goal 1-B: Ability to perform operations with numbers with and without a calculator.
Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
Goal 2-D: Interpretations of percents in various settings.
Goal 2-E: Application of percents in real-life situations.
Goal 7-A: Rounding numbers.
Goal 7-B: Estimation of present and future values from graphs or numerical information.
Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

Social Sciences:

Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
Goal 3-B: Selected principles of learning and motivation.
Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
Goal 5-B: Sources of information evaluated in terms of selective criteria.
Goal 5-C: Costs and benefits of a particular course of action.
Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
Goal 5-G: Ways to utilize the various levels of government.
Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Managing Human Resources
TASK	Establish personnel policies and procedures
PERFORMANCE STANDARD	Personnel policies and procedures will be written, and copies will be provided to each employee.

STEPS

1. Obtain and review personnel policies and procedures from similar businesses.
2. Determine personnel areas for which policies and procedures need to be written.
3. Write personnel policies and step-by-step procedures for personnel areas, such as:
    a. Work hours and breaks.
    b. Compensation.
    c. Fringe benefits.
    d. Vacations.
    e. Time off--paid and unpaid.
    f. Training.
    g. Retirement.
    h. Grievances.
    i. Promotion.
    j. Evaluation.
    k. Termination.
    l. Labor relations.
    m. Communications.
    n. Use of telephone.
    o. Relocation.
    p. Dress.
    q. Nondiscrimination.
    r. Tardiness.
4. Prepare copies of written personnel policies and procedures for each employee using photocopier.
5. Distribute copies of written personnel policies and procedures to each employee.
6. Discuss personnel policies and procedures with all employees.
7. Review and update personnel policies and procedures periodically.

KNOWLEDGE

Determine need to write personnel policies and procedures for small business.
Determine importance of putting personnel policies and procedures in writing and disseminating to all employees.
Obtain copies of personnel policies and procedures from other entrepreneurs.
List personnel areas which should be covered by personnel policies and procedures.
Write clearly and concisely when developing personnel policies and procedures.
Write legibly when preparing personnel policies and procedures.
Obtain assistance from attorney, if needed, when developing personnel policies and procedures.
Keep up to date on all local, state and federal laws, regulations and court decisions affecting personnel policies and procedures.
Locate and use parts of photocopier.

ATTITUDES

Recognize the importance of establishing personnel policies and procedures and communicating them to all employees.
Recognize the importance of providing each employee with a written copy of all personnel policies and procedures.
In addition, refer to Employability Skills List.

SAFETY

Comply with all local, state and federal laws and regulations affecting personnel policies and procedures.
Reduce the risk of lawsuits through the development and communication of clearly written personnel policies and procedures.
Keep food and beverages away from photocopier and copies of personnel policies and procedures to avoid damage to equipment, electrical shock to operator or having to recopy personnel policies and procedures.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Samples of personnel policies and procedures for similar small businesses
Paper
Pen or pencil
Photocopier
Copies of local, state and federal laws, regulations and court decisions affecting personnel policies and procedures

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS
STATE GOALS
FOR
LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-B: Ability to develop and maintain a focus with a clear thesis, a main idea, theme or unifying event.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Develop personnel handbook

PERFORMANCE STANDARD Personnel handbook will be printed, and a copy will be disseminated to each employee.

STEPS

1. Obtain and review samples of personnel handbooks from other entrepreneurs.
2. Outline information to include in personnel handbook, such as:
   a. Opening statement from owner.
   b. Company history.
   c. General policies and procedures.
   d. Benefits.
   e. Special services for employees.
   f. Conformity with government regulations.
   g. Union activity.
   h. Invention ownership/patent policy.
   i. Communication.
   j. Dress code.
   k. Bonding.
   l. Relocation policy.
3. Write material to include in each section of personnel handbook.
4. Insert appropriate reporting forms within written material.
5. Review draft handbook for completeness and correctness of material.
6. Prepare Table of Contents for personnel handbook.
7. Formalize personnel handbook by typing it, inputting it on microcomputer or hiring someone to do this.
8. Save and print personnel handbook if using microcomputer.
9. Proofread printed or typed personnel handbook, and correct any errors.
10. Prepare additional copies of finalized personnel handbook using photocopier.
11. Disseminate finalized personnel handbook to each employee.

KNOWLEDGE

Determine need for small business to prepare personnel handbook.
Write clearly and concisely when developing personnel handbook.
Include information, such as the following, in the general policies and procedures section of the personnel handbook: working hours, person responsible for personnel administration, statement of nondiscrimination, reporting to work, rest periods, absence from work, employment records, evaluation records, evaluation of performance, pay periods, shift premiums, safety and accident prevention, use of telephone, how to make suggestions/complaints and any appropriate reporting forms.
Include information, such as the following, in the benefits section of the personnel handbook: vacations, holidays (specify dates), group insurance (name administrator), sick leave, parking, training programs, bonus plan, profit-sharing plan, savings plan, suggestion awards, jury duty, military leave, pension plan/Social Security benefits, unemployment compensation, service awards, counseling, expense and travel procedures, legal services and any appropriate reporting forms.
Include information, such as the following, in the special services for employees section of the personnel handbook: credit union, education plans, employee purchases, company cafeteria/coffee service, magazine subscriptions, company-sponsored events, sports teams or activities, termination policy and any appropriate reporting forms.
Include information, such as the following, in the communication section of the personnel handbook: bulletin board rules, "open-door" policy and any appropriate forms.
Determine reporting forms which should be included in the personnel handbook.
Locate and use parts of microcomputer or typewriter.
Locate and use parts of printer.
Input or type information for personnel handbook using touch method of keyboarding.
Proofread printed or typed personnel handbook.
Correct any errors found when proofreading.
Locate and use parts of photocopier.

ATTITUDES

Recognize the importance of putting all information related to employees in writing.
Recognize the importance of providing a personnel handbook to each employee.
Review information contained in personnel handbook to ensure that it is accurate and up to date.
In addition, refer to Employability Skills List.

SAFETY	Put business rules and regulations in writing to reduce employee problems. Keep food and beverages away from equipment and copies of personnel handbook to avoid damage to equipment, electrical shock to operator or having to recopy personnel handbook. Keep magnetic media away from magnetic fields to avoid loss of stored (saved) work. Store (save) personnel handbook information frequently to avoid loss of work due to power failure or power surge. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Sample personnel handbooks from other small businesses Pinfeed, fanfold or single-sheet paper Pen or pencil Microcomputer with printer or typewriter Software Formatted diskettes Photocopier
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-B: Ability to develop and maintain a focus with a clear thesis, a main idea, theme or unifying event. Goal 3-C: Use of specific information or reasons to support and elaborate the main point. Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures. Goal 3-E: Use of standard written English conventions. Goal 3-F: Ability to revise, edit and proofread. Goal 6-D: English grammar. Social Sciences: Goal 3-B: Selected principles of learning and motivation. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-I: Roles of the individual in the world of work. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Managing Human Resources

TASK Develop job application form

PERFORMANCE STANDARD Job application form will obtain needed information from applicant and will comply with all state and federal laws.

STEPS

1. Contact local, state and federal agencies to determine what laws apply to hiring staff for specific type of business and number of employees.
2. Review all local, state and federal laws pertaining to the hiring of personnel and information which may and may not be included on job application form.
3. Obtain and review copies of application forms used by other entrepreneurs.
4. Outline information which is needed from job applicant prior to hiring, such as:
    a. Personal information.
    b. Desired employment.
    c. Education.
    d. Employment history.
    e. References.
5. Prepare handwritten application form.
6. Have application form reviewed by attorney to ensure that information being requested complies with all local, state and federal laws.
7. Have application form typeset and printed.

KNOWLEDGE

Determine need to develop formalized job application form for small business.
Determine information which may and may not be placed on job application form.
Contact other entrepreneurs to obtain copies of job application forms.
Determine information which is essential prior to hiring employees.
Obtain assistance from attorney as needed.
Keep up to date on local, state and federal laws, regulations and court decisions regarding hiring of personnel.

ATTITUDES

Respect the rights of potential employees when developing job application form.
In addition, refer to Employability Skills List.

SAFETY	Comply with all local, state and federal laws and regulations relative to hiring employees, such as the Civil Rights Act of 1964. Reduce the risk of lawsuits by eliminating from application form any information which is not essential prior to hiring employees.
EQUIPMENT AND MATERIALS	Copies of local, state and federal laws, regulations and court decisions relative to hiring personnel Sample job application forms Ruler or straightedge Paper Pen or pencil
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-G: Ways to utilize the various levels of government. Goal 5-M: Management of human and material resources.

TASK ANALYSIS
FOR
BUSINESS, MARKETING
AND MANAGEMENT OCCUPATIONS

CLUSTER:	**BUSINESS OWNERSHIP/MANAGEMENT**
OCCUPATION:	**SMALL BUSINESS OWNER/OPERATOR**
Duty Area:	Extending Credit

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Establish credit policies and procedures

PERFORMANCE STANDARD Credit policies and procedures will be clearly written, will comply with all applicable federal, state and local credit laws and regulations and will be communicated to employees and customers.

STEPS

1. Review local, state and federal laws, regulations and court decisions which affect credit and collections.
2. Analyze the advantages and disadvantages of offering credit to customers.
3. Analyze the costs and benefits of offering credit.
4. Decide to offer credit to customers.
5. Obtain and review copies of credit policies and procedures used by other small businesses.
6. Analyze available credit systems:
    a. Bank credit cards.
    b. Direct credit provided by business.
    c. Travel and entertainment cards.
7. Select type(s) of credit system(s) to offer.
8. Select specific bank credit card system(s).
9. Select direct credit plan(s):
    a. Revolving.
    b. Installment.
    c. Regular.
    d. Layaway.
10. Determine which type(s) of credit policies will be followed:
    a. Liberal granting and liberal collection.
    b. Liberal granting and strict collection.
    c. Strict granting and liberal collection.
    d. Strict granting and strict collection.
11. Write selected credit policies.
12. Write step-by-step procedures for each credit and collection policy.
13. Prepare copies of written policies and procedures for each employee using photocopier.
14. Provide each employee with a copy of business credit policies and procedures.
15. Explain credit policies and procedures to employees.
16. Discuss credit policies and procedures with customers.

STEPS
(Cont.)

17. Evaluate credit policies and procedures periodically using measures, such as:
    a. Bad debt loss index.
    b. Collection percentage.
    c. Accounts receivable turnover rate.
    d. Aging of accounts receivable analysis.
18. Make needed changes in credit policies and procedures.

KNOWLEDGE

Use terminology, such as credit, collections, external credit card system, single-purpose credit cards, all-purpose bank cards, travel and entertainment cards, authorization line, character, capacity, capital, floor limit, spot credit approval, third-party collectors, down payment, open 30-day account, 90-day charge account, revolving charge account, 30-day sales contract, budget account, coupon credit plan, conditional sales contract, chattel mortgage, layaway plan, factoring, bank credit, good risk, fair risk, poor risk, bad debt loss index, collection percentage, accounts receivable turnover rate and aging of accounts receivable analysis.
Determine need for small business to offer credit.
Determine why consumers use credit.
Determine federal, state and local laws, regulations and court decisions which affect credit, such as Equal Credit Opportunity Act, Fair Credit Reporting Act, Fair Credit Billing Act, Electronic Fund Transfer Act, Fair Debt Collection Act, Truth-in-Lending Act and Uniform Commercial Credit Code.
Determine advantages and disadvantages of offering credit.
Calculate the costs of providing credit and the possible benefits of its use.
Apply decision-making techniques.
Review sample credit policies and procedures.
Analyze the advantages and disadvantages and costs and benefits of using each type of credit system.
Analyze the costs and benefits of each available bank credit card system.
Determine the advantages and disadvantages of each type of direct credit plan.
Analyze the advantages and disadvantages of each type of credit policy.
Write clearly and legibly when preparing credit policies and procedures.
Establish policies and procedures for setting floor limit.
Establish policies and procedures for setting credit limits.
Establish spot credit approval policies and procedures.
Establish policies and procedures for rejecting credit applications.
Establish specific credit terms, finance charges and billing schedule.
Establish billing policies and procedures, such as cycle billing.
Establish collection policies and procedures which obtain money and retain goodwill of customer.

KNOWLEDGE (Cont.)

- Analyze the need to use services of credit agency to make credit decisions about credit applicants.
- Establish and adhere to plan for following up on delinquent accounts.
- Establish time when delinquent account goes from in-house to outside collection.
- Establish when to stop offering credit to a particular customer.
- Analyze the costs and benefits of using collection agency or small claims court to collect delinquent accounts.
- Set up procedures to classify delinquent customers as good risks, fair risks and poor risks.
- Locate and use parts of photocopier.
- Evaluate effectiveness of credit policies and procedures by using measures, such as bad debt loss index, collection percentage, accounts receivable turnover rate and aging of accounts receivable analysis.
- Calculate bad debt loss index using electric/electronic calculator.
- Calculate collection percentage using electric/electronic calculator.
- Calculate accounts receivable turnover rate using electric/electronic calculator.
- Locate and use parts of electric/electronic calculator.
- Age overdue accounts.
- Change credit policies and procedures as needed.
- Stay current on local, state and federal laws, regulations and court decisions which affect credit policies and procedures.

ATTITUDES

- Recognize the need for small businesses to offer credit to customers.
- Recognize the need to be flexible when applying credit policies and procedures.
- Respect the rights of customers when developing credit policies and procedures.
- In addition, refer to Employability Skills List.

SAFETY

- Reduce risk of uncollectible accounts by establishing prompt collection policies.
- Reduce customer disputes through the use of prompt and accurate billing procedures.
- Recognize the risk, expense and loss of customer goodwill of using a collection agency or filing a claim in small claims court to collect on delinquent accounts.
- Keep food and beverages away from equipment and copies of credit policies and procedures to avoid damage to equipment, electrical shock to operator or having to recopy credit policies and procedures.
- Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Copies of local, state and federal laws, regulations and court decisions regarding credit
Copies of credit policies and procedures for other small businesses
Paper
Pen or pencil
Photocopier
Electric/electronic calculator

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

**ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)**

Mathematics:

Goal 1-A: Ability to read, write and name numbers in several different ways.

Goal 1-B: Ability to perform operations with numbers with and without a calculator.

Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.

Goal 2-A: Interpretation of ratios.

Goal 2-B: Construction and solution of proportions.

Goal 2-C: Application of ratios and proportions to real-life situations.

Goal 2-D: Interpretations of percents in various settings.

Goal 2-E: Application of percents in real-life situations.

Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.

Goal 7-A: Rounding numbers.

Goal 7-B: Estimation of present and future values from graphs or numerical information.

Social Sciences:

Goal 1-F: Factors that have contributed to the economic development of the United States.

Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.

Goal 1-M: Basic economic concepts that have traditionally shaped economic systems.

Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.

Goal 5-G: Ways to utilize the various levels of government.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Extending Credit
TASK	Explain credit policies and procedures to employees and customers
PERFORMANCE STANDARD	Credit policies and procedures will be explained to employees and customers so they are completely understood by them.
STEPS	1. Review credit policies and procedures. 2. Determine which credit policies and procedures need to be explained to customers and employees. 3. Provide customers and/or employees with copies of credit policies and procedures as needed. 4. Discuss credit policies and procedures with customers and employees. 5. Question customers and employees to ensure that they fully understand the explanation.
KNOWLEDGE	Use credit terminology, such as credit; down payment; authorization line; floor limit; open 30-day account; 90-day charge account; revolving charge account; 30-day sales contract; budget account; conditional sales contract; chattel mortgage; layaway plan; collections; discounts; net 30 days; 2/10, net 30 and finance charges. Determine need to explain credit policies and procedures to customers and employees. Use probing questioning techniques.
ATTITUDES	Recognize need to explain credit policies and procedures to customers and employees. Respect the rights of customers when explaining credit policies and procedures. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of customer disputes by explaining credit policies and procedures thoroughly. Reduce risk of customer disputes by having credit policies and procedures in writing.
EQUIPMENT AND MATERIALS	Copies of established credit policies and procedures

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Secure customer credit information

PERFORMANCE STANDARD Information needed to determine if customer is good credit risk will be obtained through completion of credit application and personal interview. All information collected will comply with federal and state laws and regulations which affect credit.

STEPS

1. Contact federal and state agencies which regulate credit to determine information which can be contained on credit applications, which can be obtained through personal interviews and which complies with the Equal Credit Opportunity Act and any state laws which regulate credit applications.
2. Obtain copies of credit applications used by other small businesses, and analyze the information contained on them.
3. Design credit application which will collect the following types of information:
   a. Employment.
   b. Income.
   c. Capital assets.
   d. Outstanding obligations.
   e. Applicant's signature.
4. Have credit application reviewed by attorney to ensure its legality.
5. Have credit application printed or purchase preprinted credit applications.
6. Ask applicant to complete credit application; or ask applicant for information found on credit application, and fill in the information for applicant.
7. Ask applicant to sign credit application if he/she filled in the information, or ask applicant to verify the information and sign the application if it was completed for her/him.
8. Explain to applicant the procedures which will be followed prior to notification of approval.
9. Thank applicant.

KNOWLEDGE

Use terminology, such as credit; open 30-day account; 90-day charge account; revolving charge account; 30-day sales contract; budget account; conditional sales contract; chattel mortgage; layaway plan; collections; character; capacity; capital; capital assets; outstanding obligations; discounts; net 30 days; 2/10, net 30; finance charges and Equal Credit Opportunity Act.
Identify state and federal agencies which regulate consumer credit.
Determine laws which regulate the information which can be gathered about credit applicant.
Determine information which can be legally used to evaluate creditworthiness of customer.
Determine need for small business to develop and use credit application form.
Determine the legality of information contained on credit applications used by other small businesses.
Apply Equal Credit Opportunity Act.
Determine need to have credit application reviewed by attorney.
Explain the need to complete credit application to customer.
Obtain applicant's signature on credit application.
Write legibly when completing credit application form.
Stay current on local, state and federal laws, regulations and court decisions which affect the rights of credit applicants.

ATTITUDES

Conduct credit interview in pleasant, tactful manner so necessary information is obtained and customer is not offended.
Avoid questions about marital status.
Avoid statements during interview that could indicate race or sex bias.
Respect rights of customer when obtaining credit information.
In addition, refer to Employability Skills List.

SAFETY

Comply with all applicable federal, state and local laws and regulations which regulate the information which can be collected about credit applicants.
Reduce risk of collecting illegal information by having credit application reviewed by attorney prior to using it.
Reduce risk of lawsuits by collecting only legal information on credit applications.

EQUIPMENT AND MATERIALS

Sample credit applications from other small businesses
Customer requesting credit
Pen or pencil
Blank credit application forms
Copies of local, state and federal laws, regulations and court decisions which affect credit applications

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS
STATE GOALS
FOR
LEARNING

Language Arts:
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-I: Roles of the individual in the world of work.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Extending Credit
TASK	Obtain credit reference information from credit bureau
PERFORMANCE STANDARD	Information will be obtained from local credit bureau to enable decision to be made on the creditworthiness of customer.
STEPS	1. Contact state and federal agencies which regulate consumer credit to determine what information can be legally obtained from a local credit bureau. 2. Obtain completed credit application. 3. Call local credit bureau. 4. Provide local credit bureau with information needed to check credit information on applicant. 5. Write information obtained from local credit bureau on credit application, and list the date the information was received. 6. Verify the correctness of written information by reading it back to credit bureau representative.
KNOWLEDGE	Use terminology, such as local credit bureau, creditworthiness and Fair Credit Reporting Act. Determine the need for small business to use services of local credit bureau. Determine federal and state agencies which regulate local credit bureaus. Determine federal and state laws which regulate information that can be provided by local credit bureaus, such as Fair Credit Reporting Act. Abide by Fair Credit Reporting Act. Stay current on local, state and federal laws, regulations and court decisions which affect credit information. Write legibly when noting information on credit application. Read written information back to credit bureau representative to ensure its correctness.
ATTITUDES	Respect the rights of the customer when obtaining credit information from local credit bureau. In addition, refer to Employability Skills List.

SAFETY	Comply with all applicable federal and state laws and regulations which affect the information which can be reported by local credit bureaus. Reduce risk of lawsuits by collecting only legal information about credit applicants.
EQUIPMENT AND MATERIALS	Completed credit application form Phone number for local credit bureau Telephone Pen or pencil Copies of local, state and federal laws, regulations and court decisions which affect credit applicants
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-F: Effective and appropriate responses. Goal 4-A: Clear and expressive speaking. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 6-D: English grammar. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system. Goal 5-G: Ways to utilize the various levels of government. Goal 5-I: Roles of the individual in the world of work. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Supply credit reference information to credit bureau

PERFORMANCE STANDARD Periodic credit ratings and information on credit customers will be provided to the local credit bureau.

STEPS

1. Obtain and review reporting forms from the local credit bureau.
2. Obtain and review accounts receivable ledger for each credit customer.
3. Fill in information on reporting form, or use microcomputer to generate the requested information.
4. Mail completed report or printout to local credit bureau.

KNOWLEDGE

Determine the need to provide credit information to local credit bureau.
Write legibly when completing credit report.
Use microcomputer to provide information to local credit bureau.
Locate and use parts of microcomputer.
Use integrated accounting software.
Stay current on local, state and federal laws, regulations and court decisions which affect the reporting of credit information.
Follow established procedures for processing outgoing mail.
Determine correct amount of postage for envelope and report.
Instruct employees on information to release about customers.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.

ATTITUDES

Complete credit report accurately and in a timely manner.
Assist other small business owners by providing information on credit customers to local credit bureau.
In addition, refer to Employability Skills List.

SAFETY

Keep food and beverages away from equipment and copies of credit bureau report or printout to avoid damage to equipment, electrical shock to operator or having to redo or reprint credit bureau report.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Local credit bureau reporting forms
Accounts receivable ledgers
Pen or pencil
Microcomputer with printer
Integrated accounting software
Pinfeed, fanfold or single-sheet paper
Mailing materials

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

Social Sciences:
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Age customer accounts

PERFORMANCE STANDARD Analyze customer accounts monthly to pinpoint individual problem accounts.

STEPS

1. Age customer accounts manually:
    - a. Obtain and review accounts receivable ledger.
    - b. Prepare an analysis of accounts receivable chart which shows the date, name and address of each customer, amount(s) that have not been due 31 days, amount(s) that have been due for more than 30 but less than 60 days, amount(s) that have been due for more than 60 but less than 90 days, amount(s) that have been due for more than 90 days and any explanations or notes about each account.
    - c. Total all columns on analysis of accounts receivable chart using an electric/electronic calculator.
    - d. Calculate percentage each column is of total amount due using electric/electronic calculator.
    - e. Analyze information on chart to pinpoint any problem accounts.
2. Age customer accounts using microcomputer.
    - a. Prepare printout of accounts receivable files which shows the date, name and address of each customer, amount(s) that have not been due 31 days, amount(s) that have been due for more than 30 but less than 60 days, amount(s) that have been due for more than 60 but less than 90 days, amount(s) that have been due for more than 90 days, any explanations or notes about each account, totals for each column and percentage of total amount due.
    - b. Analyze printout to pinpoint any problem accounts.

KNOWLEDGE

Determine the need for small business to age accounts receivable.

Recognize that accounts 90 days or more past due are difficult to collect.

Write legibly when preparing analysis of accounts receivable manually.

Add, subtract, multiply and divide whole numbers using electric/electronic calculator.

KNOWLEDGE (Cont.)

Calculate percentages using electric/electronic calculator.
Use microcomputer to prepare analysis of accounts receivable.
Locate and use parts of microcomputer.
Locate and use parts of electric/electronic calculator.
Use integrated accounting software.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.

ATTITUDES

Recognize the importance of an accounts receivable analysis to a small business.
Prepare analysis of accounts receivable accurately and in a timely manner.
In addition, refer to Employability Skills List.

SAFETY

Reduce the risk of business losses by aging accounts receivable on a monthly basis.
Keep food and beverages away from equipment and copies of accounts receivable analysis to avoid damage to equipment, electrical shock to operator or having to reprint accounts receivable analysis.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Accounts receivable ledger
Accounting worksheets
Electric/electronic calculator
Pen or pencil
Microcomputer with printer
Integrated accounting software
Accounts receivable files
Pinfeed, fanfold or single-sheet paper

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 6-F: Construction of tables and graphs to indicate selected trends or relationships.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)	Social Sciences: Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Approve charges to customer accounts

PERFORMANCE STANDARD Charges to customer accounts that are above the floor limit or above the credit limit of the customer will be approved by small business owner/operator.

STEPS

1. Establish floor limit for charge sales.
2. Establish credit limit for each charge customer.
3. Establish credit-line limit for customers with multiple accounts.
4. Determine that the amount of a charge sale is above the floor limit, credit limit or credit-line limit.
5. Evaluate the ability of the charge customer to pay the additional amount being charged.
6. Make decision to approve charge.
7. Initial charge slip to show charge has been approved.

KNOWLEDGE

Use terminology, such as floor limit, credit limit and credit-line limit.
Determine floor limit for charge sales.
Analyze credit application to determine credit limit for each charge customer.
Analyze the ability of customer to pay amount(s) above credit limit, credit-line limit or floor limit.
Determine if floor limit or customer credit limit needs to be raised.
Apply decision-making techniques.
Establish guidelines for approving charges above credit limit.

ATTITUDES

Recognize the need to be flexible when applying credit policies and procedures.
Recognize the need to occasionally approve charges above credit limit, floor limit or credit-line limit.
In addition, refer to Employability Skills List.

SAFETY Reduce risk of business losses by establishing and applying credit limit, floor limit and credit-line limit.

EQUIPMENT AND MATERIALS	Customer desiring to charge amount larger than floor limit, above credit limit or above credit-line limit Completed charge slip Pen
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Social Sciences: Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-I: Roles of the individual in the world of work. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Discuss delinquent accounts with customers

PERFORMANCE STANDARD Delinquent accounts will be discussed with customers if other collection steps have been taken without result.

STEPS

1. Obtain and review analysis of accounts receivable report to determine which accounts are 60-90 days past due.
2. Obtain and review accounts receivable ledger pages for each delinquent account.
3. Obtain and review any information contained in delinquent customer's credit file.
4. Determine that all appropriate collection steps, according to business collection policies and procedures, have already been taken and that no payment has been made.
5. Contact customer personally to determine why payment of account has not been made.
6. Make arrangements for past-due payments to be made.
7. Explain to customer that further follow-up actions will be taken if the agreed-upon payments are not made.
8. Document follow-up discussion, and place documentation in customer's credit file.

KNOWLEDGE

Determine need to personally contact customers about past-due account(s).
Apply established credit policies and procedures.
Analyze costs and benefits of following up on past due accounts with a personal discussion.
Apply the Fair Debt Collection Act.
Analyze the analysis of accounts receivable report, accounts receivable ledger pages and any pertinent information in customer's credit file.
Use probing questioning techniques.
Suggest alternative payment schedule for past-due account.
Write clearly and legibly when documenting follow-up discussion.
Determine the length of time that must pass before collection is no longer possible.
Stay current on local, state and federal laws, regulations and court decisions which affect the collection of past-due accounts.
Use alphabetic or numeric filing system.

ATTITUDES

Use a positive but forceful approach when discussing unpaid balance with customer.
Use a more forceful approach each time customer has to be personally contacted.
Recognize the need to be flexible when applying credit policies and procedures.
Document all contacts with delinquent customers accurately and in a timely manner.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business losses through unpaid accounts receivable by making sure delinquent customers realize that unpaid balances will not be ignored.
Avoid violating the rights of the customer during the collection process.
Comply with all local, state and federal laws and regulations which affect the offering of credit and collection of past-due accounts.

EQUIPMENT AND MATERIALS

Copy of analysis of accounts receivable report
Identified delinquent customer accounts
Accounts receivable ledger pages for delinquent accounts
Credit files for delinquent accounts
Telephone
Paper
Pen
Copies of local, state and federal laws, regulations and court decisions which affect credit

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-F: Integration of information from more than one text. Goal 2-C: Inferences from spoken messages and nonverbal cues. Goal 2-D: Distinction among different purposes in communication. Goal 2-E: Differing perspectives and points of view. Goal 2-F: Effective and appropriate responses. Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences. Goal 3-C: Use of specific information or reasons to support and elaborate the main point. Goal 3-E: Use of standard written English conventions. Goal 4-A: Clear and expressive speaking. Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion. Goal 4-C: Development of ideas with appropriate support materials. Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting. Goal 4-E: Use of language for a variety of purposes. Goal 6-D: English grammar. Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Goal 7-G: Application of problem-solving procedures to solve or suggest a solution to a given problem. Goal 7-H: Use of mental arithmetic to estimate results of computations. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Initiate legal action on delinquent accounts

PERFORMANCE STANDARD Legal action will be taken to collect excessively delinquent accounts.

STEPS

1. Obtain and review analysis of accounts receivable report to determine which accounts are over 90 days past due.
2. Obtain and review accounts receivable ledger pages for each delinquent account.
3. Obtain and review any information contained in delinquent customer's credit file.
4. Determine that all possible collection steps, according to business collection policies and procedures, have already been taken and that no payment has been made.
5. Determine most appropriate collection step to take:
   - a. Turn delinquent account over to collection agency for collection.
   - b. File suit in small claims court if amount owed is small.
   - c. Have attorney file suit if amount owed is large.
   - d. Sell account to factoring company.
6. Document all actions taken, and place documentation in customer's credit file.

KNOWLEDGE

Use terminology, such as legal action, garnishment, small claims court, collection agency and factoring company.
Apply established credit policies and procedures.
Analyze the analysis of accounts receivable report, accounts receivable ledger pages and any pertinent information in customer's credit file.
Determine need to turn delinquent account(s) over to collection agency.
Determine need to file lawsuit to collect delinquent account(s).
Determine need to sell delinquent account to factoring company.
Analyze the costs and benefits of turning delinquent account(s) over to collection agency, filing lawsuit or selling delinquent account(s) to a factoring company.
Apply Fair Debt Collection Act.
Determine costs of each collection method prior to implementing it.
Write clearly and legibly when documenting any action taken on delinquent account(s).

KNOWLEDGE (Cont.)	Consider writing off small, past-due amounts and not extending further credit to customer to gain further cash business rather than initiating final collection procedures. Determine the length of time that must pass before collection is no longer possible. Stay current on local, state and federal laws, regulations and court decisions which affect the collection of past-due accounts. Use alphabetic or numeric filing system.
ATTITUDES	Document all action taken on delinquent account(s) accurately and in a timely manner. Recognize the need to be flexible when applying credit policies and procedures. Recognize that a customer will probably be lost if final collection procedures are initiated. In addition, refer to Employability Skills List.
SAFETY	Avoid time-consuming and costly procedures of using a collection agency, selling delinquent account(s) to a factoring company or filing a lawsuit by taking prompt, strong action to collect past-due accounts. Avoid violating the rights of customers during the collection process. Comply with all local, state and federal laws and regulations which affect the offering of credit and collection of past-due accounts.
EQUIPMENT AND MATERIALS	Copy of analysis of accounts receivable report Identified delinquent customer accounts Ledger pages for delinquent accounts Credit files for delinquent accounts Paper Pen Copies of local, state and federal laws, regulations and court decisions which affect the collection of past-due accounts
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-E: Use of standard written English conventions.
- Goal 6-D: English grammar.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Evaluate credit application

PERFORMANCE STANDARD Credit application will be evaluated to determine if credit should be approved or denied and to determine the credit limit for approved accounts. Customer will be notified in writing of approval or rejection.

STEPS

1. Obtain customer's credit application.
2. Obtain credit evaluation form.
3. Evaluate and rate the customer's ability to pay:
   a. Verify employment.
   b. Verify earnings.
   c. Calculate monthly obligations using electric/electronic calculator.
   d. Consider number of dependents.
4. Evaluate and rate the customer's willingness to pay:
   a. Check credit references.
   b. Contact local credit bureau.
5. Evaluate and rate the customer's physical and financial assets, such as:
   a. Bank balance(s).
   b. Personal assets.
6. Evaluate the profitability of the account.
7. Make decision to approve or reject credit.
8. Set credit limit for approved account.
9. Document credit approval or rejection.
10. Assign credit account number to approved credit account.
11. Set up credit file.
12. File copy of credit application, evaluation report and notification letter in credit file.
13. Notify customer in writing of approval or rejection and of exact payment terms.
14. Submit data on action taken to local credit bureau.

KNOWLEDGE

Use terminology, such as character, capacity and capital.
Determine need for small business to evaluate credit applications.
Apply the Equal Credit Opportunity Act.
Design credit evaluation form.
Establish rating standards for credit evaluation.
Add, subtract, multiply and divide whole numbers using electric/electronic calculator.

KNOWLEDGE (Cont.)

Use decision-making techniques.
Establish standardized credit limits based on credit rating system.
Write clearly and legibly when documenting credit approval or rejection.
Write letters for approval or rejection of credit application.
Use alphabetic or numeric filing system.
Stay current on local, state and federal laws, regulations and court decisions which affect the evaluation of credit applications.

ATTITUDES

Recognize the importance of notifying customer in writing of credit approval, corresponding credit limit and exact payment terms.
Recognize the importance of notifying customer in writing of rejection of credit application.
Use tact in rejecting credit application so business of customer will be retained.
Recognize the need to be flexible when applying credit policies and procedures.
Document all credit evaluation information accurately and in a timely manner.
In addition, refer to Employability Skills List.

SAFETY

Reduce risk of business losses by thoroughly evaluating credit applications.
Avoid violating the rights of the customer when evaluating credit applications.
Comply with all local, state and federal laws and regulations which affect the evaluation of credit applications.

EQUIPMENT AND MATERIALS

Completed customer credit application
Credit evaluation form
Paper
Pen
File folder and label
Electric/electronic calculator
Telephone
Copies of local, state and federal laws, regulations and court decisions which affect the evaluation of credit applications

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS
STATE GOALS
FOR
LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 7-E: Ability to determine what conclusions are valid from a given set of information.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Extending Credit

TASK Follow up on delinquent accounts

PERFORMANCE STANDARD Delinquent accounts will be followed up on periodically. Laws affecting credit collections will be strictly adhered to when applying collection procedures.

STEPS

1. Obtain and review analysis of accounts receivable report to determine which accounts are delinquent.
2. Obtain and review accounts receivable ledger pages for each delinquent account.
3. Obtain and review any information contained in delinquent customer's credit file.
4. Notify customers formally that accounts are past due by less than 30 days by sending out a second or reminder billing.
5. Send out additional reminder billings, according to company collections policies and procedures, using collections stickers and stronger wording each time.
6. Send out personal collection letters that are initially friendly and become more terse and demanding with each letter.
7. Telephone customers with accounts that are 60-90 days past due to try to determine the problem and arrange for alternative payments.
8. Turn excessively past-due accounts over to collection agency or sell to a factoring company.
9. File a lawsuit in small claims court to collect small amounts which cannot be collected by collection agency.
10. Have attorney file a lawsuit to collect large amounts which cannot be collected by collection agency.
11. Document all action taken, and place documentation in customer's credit file.
12. Submit data on action taken to local credit bureau.

KNOWLEDGE

Determine need for small business to follow established collection procedures.

Use terminology, such as legal action, garnishment, small claims court, collection agency, factoring company and collection sticker.

Determine which accounts should be classified as delinquent and require follow up.

Analyze information in accounts receivable ledger and individual customer credit file prior to initiating follow up.

KNOWLEDGE (Cont.)

Follow established collections policies and procedures.
Evaluate the costs and benefits of each step in the collection process prior to taking that step.
Send a registered letter to customer to give final payment date and any action that will be taken if payment is not made by that date.
Apply the Fair Debt Collection Act.
Write clearly and legibly when documenting any action taken on delinquent accounts.
Consider writing off small, past-due accounts and not extending further credit to customer to gain further cash business rather than initiating final collection procedures.
Determine the length of time that must pass before collection is no longer possible.
Stay current on local, state and federal laws, regulations and court decisions which affect the collection of past-due accounts.
Use alphabetic or numeric filing system.

ATTITUDES

Document all action taken on delinquent account(s) accurately and in a timely manner.
Recognize the need to be flexible when applying credit policies and procedures.
Recognize that a customer will probably be lost if final collection procedures are initiated.
In addition, refer to Employability Skills List.

SAFETY

Avoid violating the rights of customers during the collection process.
Comply with all local, state and federal laws and regulations which affect the offering of credit and collection of past-due accounts.

EQUIPMENT AND MATERIALS

Copy of analysis of accounts receivable report
Ledger pages for delinquent accounts
Credit files for delinquent accounts
Collection stickers
Paper
Pen
Telephone
Copies of local, state and federal laws, regulations and court decisions which affect the offering of credit and collection of past-due accounts

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-C: Use of specific information or reasons to support and elaborate the main point.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-B: Orderly presentation of ideas with appropriate introduction, elaboration and conclusion.
- Goal 4-C: Development of ideas with appropriate support materials.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 7-G: Application of problem-solving procedures to solve or suggest a solution to a given problem.
- Goal 7-H: Use of mental arithmetic to estimate results of computations.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-L: Strategies for conflict resolution evaluated in terms of selected criteria.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS
FOR
BUSINESS, MARKETING
AND MANAGEMENT OCCUPATIONS

CLUSTER:	**BUSINESS OWNERSHIP/MANAGEMENT**
OCCUPATION:	**SMALL BUSINESS OWNER/OPERATOR**
Duty Area:	Performing Merchandising Duties

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Prepare merchandise plan

PERFORMANCE STANDARD Merchandise plan will be clearly written, will set realistic and attainable monthly and annual goals and will be communicated to key employees.

STEPS

1. Review business merchandising policy.
2. Obtain and review reports for previous year which show monthly sales figures, beginning and ending stock levels for each month, markups, markdowns and shortages.
3. Determine local business conditions and consumer buying trends.
4. Prepare annual merchandise plan which compares amounts from previous year to goals for current year in terms of the following:
    a. Sales.
    b. Beginning stock inventory.
    c. Ending stock inventory.
    d. Shortages and planned markdowns.
    e. Purchases.
    f. Percent of markup.
5. Break down annual merchandise plan on a monthly basis to show previous year's actual amounts and monthly goals.
6. Prepare copies of annual and monthly merchandise plans for appropriate employees using photocopier.
7. Distribute annual and monthly merchandise plans to key personnel.
8. Discuss annual and monthly merchandise plans with key employees.

KNOWLEDGE

Use terminology, such as planned sales, planned stock, beginning of the month (BOM), end of the month (EOM), shortage, markdown, markup, variable expenses, fixed expenses and stock-sales ratio.

Determine the need for small business to develop and follow a merchandise plan.

Determine benefits of preparing a merchandise plan.

Use resources, such as national magazines; specialized trade publications; area newspapers and bulletins from banks, trade associations and the local chamber of commerce, to identify local business conditions and trends in consumer buying patterns.

KNOWLEDGE (Cont.)

Keep business merchandising policy in mind when preparing merchandise plan.
Set realistic and attainable goals for sales, stock to keep on hand, purchases, expenses, markups, markdowns and shortages.
Base merchandising goals on past records, general business conditions, competition, trends in customer demand and significant changes in business operations or policies.
Calculate inventory level to keep on hand using electric/electronic calculator.
Calculate the stock-sales ratio at the beginning of the month using electric/electronic calculator to determine if adequate stock is on hand.
Calculate amount of stock to have on hand at the beginning of the month or year (planned sales X stock-sales ratio) using electric/electronic calculator.
Adjust forecast amounts for inflation.
Locate and use parts of photocopier.
Determine personnel who need to be familiar with annual and monthly merchandise plans.
Locate and use parts of electric/electronic calculator.

ATTITUDES

Recognize the importance of establishing realistic and attainable merchandising goals.
Recognize the importance of involving key personnel in carrying out the merchandise plans.
In addition, refer to Employability Skills List.

SAFETY

Reduce the risk of business failure by preparing realistic and achievable merchandise plans.
Keep food and beverages away from photocopier and copies of merchandise plans to avoid damage to equipment, electrical shock to operator or having to recopy merchandise plans.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Monthly and annual financial reports
Resources, such as national magazines, trade publications, local newspapers and local bulletins
Paper
Pen or pencil
Photocopier
Electric/electronic calculator

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-B: Construction and solution of proportions.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 4-C: Translation of verbal descriptions into algebraic expressions, equations or inequalities and vice versa.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value.

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Implement seasonal merchandise plan

PERFORMANCE STANDARD Seasonal merchandise plan will be followed and its effectiveness evaluated upon completion of the season.

STEPS

1. Obtain and review seasonal merchandise plan, or develop seasonal merchandise plan if one has not been developed.
2. Determine if planned stock is on hand or on order at beginning of season to meet planned sales volume.
3. Establish daily, weekly or monthly inventory targets so adequate stock will be available throughout the season, but excess stock will not be kept on hand.
4. Use established inventory targets to determine when to place reorders.
5. Calculate open-to-buy to determine if business is in a position to place reorders using electric/electronic calculator.
6. Place reorders.
7. Price merchandise based on seasonal merchandise plan.
8. Take markdowns as planned.
9. Compare actual amounts for sales, stock, shortages, markdowns, purchases and markup percents with planned amounts to determine how well seasonal merchandise plan was met.

KNOWLEDGE

Use terminology, such as beginning of the month (BOM), stock-sales ratio, planned sales, planned stock, open-to-buy, end of the month (EOM), seasonal, business cycle, shortage, markdown, markup and inventory targets.
Determine need for small business to develop and follow a seasonal merchandise plan.
Determine benefits of following a seasonal merchandise plan.
Develop seasonal merchandise plan.
Calculate stock-sales ratio using electric/electronic calculator.
Multiply stock-sales ratio times the planned sales for the season, using electric/electronic calculator, to determine amount of stock to have on hand at the beginning of the season.
Establish realistic daily, weekly or monthly inventory targets.
Calculate open-to-buy, using electric/electronic calculator, to determine if business is in a position to purchase additional inventory.
Locate and use parts of electric/electronic calculator.
Write legibly when preparing order forms.

KNOWLEDGE (Cont.)	Calculate markup amount for each item using electric/electronic calculator. Calculate sales price for merchandise using electric/electronic calculator. Determine advantages of taking planned markdowns. Calculate markdowns on merchandise using electric/electronic calculator. Determine need to evaluate effectiveness of seasonal merchandise plan. Evaluate effectiveness of seasonal merchandise plan.
ATTITUDES	Recognize the importance of implementing a seasonal merchandising plan. Recognize the importance of involving key personnel in carrying out seasonal merchandise plan. In addition, refer to Employability Skills List.
SAFETY	Reduce the risk of being overstocked by implementing seasonal merchandise plan. Reduce the risk of business failure by implementing a realistic and attainable seasonal merchandising plan. Keep food and beverages away from equipment to avoid damage to equipment or electrical shock to operator. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Established seasonal merchandise plan Pen or pencil Electric/electronic calculator
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-B: Construction and solution of proportions.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 4-C: Translation of verbal descriptions into algebraic expressions, equations or inequalities and vice versa.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value.

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Determine inventory on hand

PERFORMANCE STANDARD Inventory on hand will be determined by taking a physical count or maintaining a perpetual inventory and will be recorded and updated periodically as established by business.

STEPS

1. Determine frequency for updating inventory records (daily, weekly or monthly).
2. Determine inventory on hand by taking physical inventory:
    a. Develop or obtain inventory form on which to record stock count.
    b. Take a physical count of inventory on hand.
    c. List amount on hand for each item on inventory form.
3. Determine inventory on hand by maintaining a perpetual inventory manually:
    a. Tear off part of price tag which indicates item number, size and color for each item sold; or record that information on sales slip.
    b. Place tags or duplicate sales slips in designated location.
    c. Obtain stock records for merchandise in inventory.
    d. Record changes in inventory on appropriate stock record (sales, returns and orders received).
    e. Calculate inventory on hand using electric/electronic calculator (quantity on hand at beginning of business day plus new orders received less quantity sold plus quantity returned).
    f. Record current inventory on hand on stock record.
4. Determine inventory on hand by maintaining a perpetual inventory on a microcomputer:
    a. Tear off part of price tag which indicates item number, size and color for each item sold; or record that information on sales slip.
    b. Place tags or duplicate sales slips in designated location.
    c. Update and store merchandise records in inventory master file to reflect daily sales, returns and orders received.
    d. Print periodic reports showing inventory on hand.

STEPS (Cont.)

5. Determine inventory on hand using a point-of-sale system.
   a. Input inventory data in cash register through its keyboard or by scanning price tag or universal product code (UPC) with scanner to update merchandise records in inventory master file.
   b. Update inventory master file further by inputting returns and new orders received.
   c. Print periodic reports showing inventory on hand.

KNOWLEDGE

Use terminology, such as stock count, physical inventory, perpetual inventory, record, file, master file, file maintenance, point-of-sale system, universal product code (UPC), price tag, stock record and optical scanning.
Determine need for small business to determine inventory on hand by taking a physical inventory and/or by maintaining a perpetual inventory by item or department.
Determine costs and benefits of taking both physical inventory and maintaining perpetual inventory.
Select most efficient method of keeping track of inventory on hand for specific business.
Determine how often physical inventory needs to be taken.
Determine how often inventory records should be updated when using a perpetual inventory system.
Develop inventory form and/or stock record for maintaining inventory information.
Write legibly when completing inventory form and stock record.
Calculate inventory on hand using electric/electronic calculator.
Locate and use parts of electric/electronic calculator.
Use microcomputer and inventory control software to maintain perpetual inventory records.
Locate and use parts of microcomputer.
Create inventory master file.
Locate and use parts of electronic point-of-sale cash register.
Locate and use parts of scanning equipment.
Analyze periodic inventory reports to determine current inventory on hand.
Insert and adjust pinfeed, fanfold or single-sheet paper in printer.

ATTITUDES

Complete sales slip, inventory form and stock record accurately.
Input inventory data in inventory records accurately and in a timely manner.
In addition, refer to Employability Skills List.

SAFETY

Reduce costs by minimizing markdowns and preventing out-of-stock merchandise through effective inventory control.

Reduce the risk of business losses by maintaining perpetual inventory and conducting a periodic physical inventory.

Reduce merchandise shortages by keeping current on amounts of inventory on hand.

Increase personal knowledge of inventory losses by performing spot checks to compare inventory records and actual inventory on hand.

Keep food and beverages away from equipment and copies of inventory records and reports to avoid damage to equipment, electrical shock to operator or having to redo inventory records and reports.

Keep magnetic media away from magnetic fields to avoid loss of stored (saved) work.

Store (save) inventory data frequently to avoid loss of work due to power failure or power surge.

Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Merchandise on hand
Inventory forms
Pen or pencil
Stock records
Price tags
Sales slips
Electric/electronic calculator
Microcomputer with printer
Inventory control software
Formatted diskettes
Pinfeed, fanfold or single-sheet paper
Cash register
Scanning equipment
Point-of-sale system

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 4-C: Translation of verbal descriptions into algebraic expressions, equations or inequalities and vice versa.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
- Goal 7-A: Rounding numbers.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Social Sciences:

Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

Goal 5-B: Sources of information evaluated in terms of selective criteria.

Goal 5-C: Costs and benefits of a particular course of action.

Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Prepare open-to-buy

PERFORMANCE STANDARD Open-to-buy amount will be calculated to determine the amount of merchandise that can be received into stock without exceeding planned closing stock level at the end of the merchandising period.

STEPS

1. Determine amounts of merchandise inventory on hand.
2. Determine amounts of merchandise on order but not yet delivered.
3. Determine amounts of planned stock for beginning of next planning period.
4. Determine amounts of planned sales for current merchandise planning period.
5. Determine amounts of planned shortages and planned markdowns for current merchandise planning period.
6. Calculate open-to-buy, using electric/electronic calculator, as follows:
   a. Add planned stock for beginning of period, planned sales for current period, planned shortages and planned markdowns to get total stock required during the merchandise planning period.
   b. Add merchandise on hand and merchandise on order to get stock currently purchased.
   c. Subtract stock currently purchased (b) from total stock required (a) to get open-to-buy amount.
7. Use open-to-buy to determine if additional stock can be ordered.
8. Recalculate open-to-buy amount as buying position changes.

KNOWLEDGE Use terminology, such as open-to-buy, planned stock, planned sales, shortages and markdowns.
Determine need for small business to use an open-to-buy amount.
Determine advantages of using an open-to-buy amount.
Determine frequency at which open-to-buy should be calculated.
Determine reasons to recalculate open-to-buy.
Locate amounts needed to calculate open-to-buy.
Locate and use parts of electric/electronic calculator.
Add and subtract whole numbers using electric/electronic calculator.

ATTITUDES	Recognize the importance of the open-to-buy amount to the success of a small business. Calculate open-to-buy accurately and in a timely manner. In addition, refer to Employability Skills List.
SAFETY	Reduce the costs of maintaining excess stock by calculating and staying within the open-to-buy amount. Keep inventory investment within merchandise plans by staying within the open-to-buy amount.
EQUIPMENT AND MATERIALS	Merchandise plan Electric/electronic calculator
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Goal 1-B: Ability to perform operations with numbers with and without a calculator. Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators. Goal 7-G: Application of problem-solving procedures to solve or suggest a solution to a given problem. Social Sciences: Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Performing Merchandising Duties
TASK	Select suppliers
PERFORMANCE STANDARD	Selected suppliers will be those which provide the desired merchandise with the most favorable purchasing terms.

STEPS

1. Determine type(s) of merchandise to be ordered.
2. Determine the ideal terms for purchasing merchandise, such as:
   a. Needed quantity and quality of merchandise.
   b. Guaranteed delivery date.
   c. Competitive delivery terms.
   d. Competitive discounts.
   e. Competitive credit terms.
   f. Competitive price.
   g. Ease of ordering.
   h. Claim and return procedures.
3. Obtain and review resource cards for potential suppliers to determine information on past experience, such as:
   a. Terms of purchase.
   b. Price of goods.
   c. Promptness of delivery.
   d. Correctness of order.
   e. Marketability of goods.
   f. General impression of firm.
   g. Exclusive right to merchandise.
4. Eliminate suppliers who have failed to provide expected service.
5. Contact suppliers to determine which supplier(s) will best meet the identified purchasing terms.
6. Analyze information received for each type of merchandise.
7. Calculate total cost of purchasing the merchandise from each supplier based on initial quotes.
8. Make decision on which supplier(s) to use.
9. Negotiate specific terms of purchase with selected supplier(s).

KNOWLEDGE	Use terminology, such as suppliers, central market, buying offices, key resources, wholesalers, resource files, resource cards, FOB shipping point, FOB city of destination, FOB store, title, cash discount, trade discount, seasonal discount, quantity discount, dating, ordinary dating, advanced dating, extra dating, EOM (end of month) dating, ROG (receipt of goods) dating, anticipation dating, consignment buying, memorandum buying and negotiation. Determine need for small business to negotiate terms of purchases. Determine the most ideal terms of purchase for needed merchandise. Prioritize the terms of purchase. Maintain resource file and resource cards for each supplier. Write legibly when making notations on resource cards. Analyze purchasing terms provided by each supplier. Calculate total costs to purchase merchandise from each supplier using electric/electronic calculator. Analyze the costs and benefits for various types of terms offered. Use effective decision-making techniques when selecting suppliers. Negotiate with selected supplier(s) to obtain the best possible purchasing terms. Use alphabetic and subject filing systems. Establish procedures to review suppliers for price and service.
ATTITUDES	Recognize the importance of customer services provided by suppliers. Recognize the value of negotiating with suppliers for purchasing terms. Maintain business image through the purchase of appropriate quality of merchandise. In addition, refer to Employability Skills List.
SAFETY	Investigate reputation of potential suppliers to ensure their ability to adequately serve business needs. Reduce risk of business losses by dealing with reputable suppliers who will best meet business needs.
EQUIPMENT AND MATERIALS	Resource file for suppliers Resource cards for suppliers Pen or pencil Electric/electronic calculator
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.

ILLINOIS
STATE GOALS
FOR
LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 6-D: English grammar.

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.

Social Sciences:

- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Order merchandise

PERFORMANCE STANDARD Merchandise will be ordered by accurately completing purchase order.

STEPS

1. Review the terms for purchasing merchandise which have been previously negotiated.
2. Fill out purchase order with the following types of information:
   a. Purchase order number.
   b. Date of purchase order.
   c. Supplier's name and address.
   d. Shipping or delivery instructions and costs.
   e. Date of desired delivery.
   f. Terms of sale.
   g. Description of merchandise, including quantity, stock number, unit price and suggested retail price.
   h. Manufacturer number.
   i. Customer number.
3. Calculate total price for each type of merchandise using electric/electronic calculator.
4. Check information on purchase order to ensure its correctness.
5. Sign purchase order.
6. Mail purchase order to supplier.
7. File copy of purchase order for future reference.

KNOWLEDGE

Determine need for small business to use purchase order when ordering merchandise.
Negotiate terms for purchasing merchandise.
Write legibly when preparing purchase order.
Calculate total price, using electric/electronic calculator, by multiplying unit price times quantity.
Follow established mailing procedures.
Request confirmation copy of order if placing telephone order.
Use numeric filing system.

ATTITUDES

Complete purchase orders accurately and in a timely manner.
In addition, refer to Employability Skills List.

SAFETY	Reduce risk of disagreements with suppliers by accurately completing purchase orders and by getting written confirmation of order. Check order confirmation carefully.
EQUIPMENT AND MATERIALS	Copy of previously negotiated purchasing terms Blank purchase orders Pen or pencil Electric/electronic calculator Mailing materials
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Goal 1-B: Ability to perform operations with numbers with and without a calculator. Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators. Goal 7-A: Rounding numbers. Social Sciences: Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.

TASK ANALYSIS

OCCUPATION	Small Business Owner/Operator
DUTY AREA	Performing Merchandising Duties
TASK	Forecast merchandise reorders
PERFORMANCE STANDARD	Merchandise reorders will be forecast so adequate stock is available to meet customer demand.
STEPS	1. Establish inventory target and target reorder date for merchandise carried by business. 2. Obtain and review inventory reports. 3. Highlight items which are nearing the inventory target level or target reorder date. 4. Estimate length of time it will take for each item to reach inventory target level. 5. Revise target reorder date, if needed, and note on inventory report. 6. Monitor progress of sales toward inventory target.
KNOWLEDGE	Determine the need for small business to establish target reorder dates and inventory targets. Determine the need for small business to monitor progress of inventory toward inventory target amount. Establish inventory target amount based on any established reorder period (days, weeks or months); the delivery period (days, weeks or months) and units sold each day, week or month. Identify length of delivery period. Calculate inventory target using electric/electronic calculator. Locate and use parts of electric/electronic calculator.
ATTITUDES	Recognize importance of continually monitoring merchandise inventory levels. Recognize the impact on small business of being in overstocked or understocked position. In addition, refer to Employability Skills List.
SAFETY	Reduce the risk of being understocked or overstocked by monitoring inventory levels.

EQUIPMENT AND MATERIALS	Inventory reports Highlighting marker Pen or pencil Electric/electronic calculator
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Goal 1-B: Ability to perform operations with numbers with and without a calculator. Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators. Goal 7-B: Estimation of present and future values from graphs or numerical information. Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value. Social Sciences: Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors. Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Process incoming merchandise

PERFORMANCE STANDARD All incoming merchandise will be received, and appropriate forms will be accurately completed.

STEPS

1. Accept shipment from shipper.
2. Request inside delivery from shipper.
3. Negotiate any additional charges for inside delivery, if not included in shipping charges.
4. Obtain and review purchase order and/or invoice, if available.
5. Count each carton as it is unloaded.
6. Examine each carton for damage.
7. Note any damages on delivery receipt or bill of lading and on discrepancies report.
8. Record each item received on receiving record or receiving book.
9. Compare receiving record with purchase order to ensure that all items have been received.
10. Note any discrepancies on receiving record and on discrepancies report.
11. Sign and date delivery receipt or bill of lading.
12. Check bill of lading to make sure correct shipping charges have been assessed.
13. Pay shipping charges or arrange for their payment with shipper.
14. Submit claim to transportation company for any overcharges on incoming collect shipments.
15. File copy of delivery receipt or bill of lading and receiving record.

KNOWLEDGE

Use terminology, such as inside delivery, receiving, checking, delivery receipt, receiving book, receiving record, shortage, overage, substitution, receiving area, apron, invoice, rack jobbers, carrier, shipping date, bill of lading, FOB city of destination, FOB store, FOB shipping point and purchase order.

Determine the need to establish and follow set procedures for receiving incoming merchandise.

Locate and use information from delivery receipt, invoice, bill of lading and purchase order.

KNOWLEDGE (Cont.)	Complete receiving records, such as receiving book and receiving record. Write legibly when noting discrepancies, signing for merchandise or completing reports. Calculate appropriate shipping charges for shipment using electric/electronic calculator. Locate and use parts of electric/electronic calculator.
ATTITUDES	Recognize the importance of the receiving function to small business. Perform receiving functions accurately and in a timely manner. Complete all receiving reports accurately. In addition, refer to Employability Skills List.
SAFETY	Reduce the risk of theft of incoming merchandise by having the official receiving point be inside building rather than on sidewalk. Obtain signature of driver for any discrepancies in shipment.
EQUIPMENT AND MATERIALS	Incoming merchandise Receiving forms, such as bill of lading, invoice, delivery receipt, receiving book, receiving record and purchase order Pen Electric/electronic calculator
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Goal 1-B: Ability to perform operations with numbers with and without a calculator. Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators. Goal 7-A: Rounding numbers. Goal 7-H: Use of mental arithmetic to estimate results of computations. Social Sciences: Goal 1-H: Economic impacts of political decisions made by federal, state and local governments. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Return damaged merchandise

PERFORMANCE STANDARD Damaged merchandise will be repacked and labeled according to shipper's guidelines and will be shipped back to vendor. A claim will be filed with supplier or shipper.

STEPS

1. Determine that merchandise received is damaged.
2. Contact supplier for instructions on returning damaged merchandise.
3. Select appropriate container in which to return damaged merchandise.
4. Select appropriate packing material, such as shredded newspaper, styrofoam packing and confetti, for merchandise being returned.
5. Place packing material on bottom of container.
6. Place damaged merchandise in center of container.
7. Place packing material around and over damaged merchandise.
8. Close and tape container.
9. Label container with supplier's full name and address and with sender's full name and address.
10. Contact shipper to arrange for pickup of package.
11. Pay shipper or arrange for payment, if needed.

KNOWLEDGE

Determine most appropriate shipper to use based on cost and delivery time involved, or use shipper designated by supplier.
Determine appropriate packing material for merchandise being shipped, such as shredded newspaper, confetti or styrofoam packing material.
Use tape that is approved by shipper.
Follow packaging guidelines provided by shipper.
Write legibly when preparing shipping label.

ATTITUDES

Recognize the importance of returning damaged merchandise to supplier for a refund or credit.
Complete address label accurately.
Return damaged merchandise in a timely manner.
In addition, refer to Employability Skills List.

SAFETY	Reduce business losses by returning damaged merchandise to supplier for a refund or credit. Inform supplier as soon as possible of damaged merchandise.
EQUIPMENT AND MATERIALS	Damaged merchandise Shipping container Address label Packing material, such as shredded newspaper, confetti or styrofoam Tape that is approved by shipper Scissors Pen or marker
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Social Sciences: Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Plan merchandise storage space

PERFORMANCE STANDARD Merchandise storage space will be planned and drawn to scale, and appropriate storage fixtures will be selected.

STEPS

1. Determine need to maintain reserve stock area.
2. Determine types of stock and amounts of each type of stock to be kept in reserve stock.
3. Obtain graph paper to use to plan layout of reserve stock area.
4. Draw to scale and label the layout of the reserve stock area considering the following:
    a. Providing access to reserve stock without having to go through selling area.
    b. Arranging goods in reserve stock similar to the way they are on selling floor.
    c. Arranging goods so they can be easily replenished and counted.
    d. Making arrangement flexible enough to allow for storage of new items or expansion of storage for fast-selling items.
    e. Making aisles wide enough to allow merchandise to be moved in and out easily.
5. Select most appropriate type(s) of storage fixtures, such as shelving, racks or bins.

KNOWLEDGE

Use terminology, such as reserve stock, drop-shipping and forward stock.

Determine need to maintain a reserve stock area for the specific business.

Analyze costs and benefits of maintaining reserve stock.

Maintain limited amounts of reserve stock by reordering frequently and in small lots and by maintaining most stock in forward stock.

Draw reserve stock area to scale.

Write legibly when labeling scale reserve stock area.

Analyze costs and benefits of various types of stock storage fixtures.

ATTITUDES	Recognize the importance of effective stockkeeping to small business. Show concern for employees by planning a safe and convenient area for storing reserve stock. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of losses from stock damage and pilferage through effective planning of reserve stock area. Reduce markdowns by planning for proper care of reserve stock. Reduce stockkeeping costs by eliminating or limiting amount of reserve stock. Plan reserve stock area to reduce risk of injury to employees.
EQUIPMENT AND MATERIALS	Graph paper Pen or pencil
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Goal 1-B: Ability to perform operations with numbers with and without a calculator. Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators. Goal 2-B: Construction and solution of proportions. Goal 2-C: Application of ratios and proportions to real-life situations. Goal 3-A: Measurement in various contexts using appropriate units. Goal 3-B: Estimation of measurements. Goal 3-E: Application of selected measurement systems, instruments and techniques. Physical Development and Health: Goal 3-G: Safety procedures at home, workplace, school and recreation sites for the prevention of fires, poisoning, drowning and other accidents.

ILLINOIS STATE GOALS FOR LEARNING (Cont.)

Social Sciences:

- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Prepare merchandise for stock or immediate store display

PERFORMANCE STANDARD Merchandise will be checked and readied for placement in reserve stock or placement on selling floor.

STEPS

1. Obtain stock from receiving area.
2. Open each carton being careful not to damage contents.
3. Remove contents from carton, and sort merchandise.
4. Remove any packing materials, such as plastic bags, boxes or styrofoam, that are not needed for storage.
5. Count all merchandise; and compare count with quantity on purchase order, packing list or invoice.
6. Prepare dummy invoice if indirect check system is being used.
7. Inspect merchandise to make sure that it is the quality and exact item ordered.
8. Complete discrepancies report (overage, shortage and damage report) to indicate any breakage, damage, shortage, overage or unacceptable substitution of merchandise.
9. Note any problems on purchase order, packing list or invoice prior to signing it.
10. Sign purchase order, packing list or invoice.
11. File purchase order, packing list or invoice in open- or closed-order file for future reference.
12. Clean and dust merchandise, if needed.
13. Move prepared stock to marking area.
14. Clean up and dispose of all packing materials.
15. Tag merchandise if it was a special order for a customer.

KNOWLEDGE

Use terminology, such as checking, shortage, overage, substitution, bulk check, spot check, direct check, blind check, dummy invoice, dummy invoice check, invoice, purchase order, discrepancies report and packing list.

Determine need to establish and follow set procedures for checking incoming merchandise.

Determine appropriate location for checking incoming merchandise.

Locate and use information from invoice, purchase order and packing list.

Complete checking records, such as dummy invoice and discrepancies report.

Write legibly when noting discrepancies, signing for merchandise or completing reports.

KNOWLEDGE (Cont.)	Use alphabetic, numeric and subject filing systems. Use appropriate techniques for opening cartons to ensure that merchandise is not damaged. Sort merchandise according to established classifications. Determine the quality of the merchandise ordered and compare with that received. Determine types of packing materials to be removed from merchandise prior to placing it in reserve or forward stock. Determine appropriate methods for disposing of packing materials. Maintain open-order file for orders which are incorrect or incomplete. Maintain closed-order file for orders which are correct and complete.
ATTITUDES	Recognize the importance of the checking function to small business. Recognize the need to keep the checking area free of packing debris. Perform checking functions accurately and in a timely manner. Complete all receiving reports accurately and in a timely manner. In addition, refer to Employability Skills List.
SAFETY	Open each carton carefully so contents are not damaged. Use care when using box cutter to open cartons. Increase the possibility of receiving a refund for merchandise shortages, substitutions or damaged merchandise by accurately completing receiving reports.
EQUIPMENT AND MATERIALS	Incoming merchandise Receiving forms, such as invoice, packing list, purchase order, dummy invoice and discrepancies report Pen Box cutter
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Mathematics: Goal 1-A: Ability to read, write and name numbers in several different ways. Social Sciences: Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Code and date stock

PERFORMANCE STANDARD Stock codes and dates will be legibly and accurately placed on merchandise price tickets.

STEPS

1. Obtain merchandise from checking area.
2. Apply established merchandise coding and dating system.
3. Sort merchandise which must be coded and dated individually from that which will not be marked and that which has been preticketed by the vendor.
4. Obtain equipment needed to label merchandise price tickets.
5. Obtain appropriate type(s) of price ticket(s) for specific merchandise.
6. Label price tickets with appropriate codes and dates, such as:
   a. Cost of merchandise.
   b. Manufacturer number.
   c. Department number.
   d. Size.
   e. Style.
   f. Color.
   g. Date received.
   h. Selling season.
   i. Part number.
   j. Sell-by date.

KNOWLEDGE

Use terminology, such as nonmarking, item marking, vendor marking, preticketing and premarking.
Determine the need for small business to code and date stock.
Determine types of merchandise which must provide customers with an expiration date.
Analyze costs and benefits of coding and dating merchandise.
Analyze costs and benefits of labeling equipment.
Select appropriate price ticket for each type of merchandise.
Determine types of information to include when coding and dating merchandise.
Analyze costs and benefits of obtaining merchandise which has been premarked.
Analyze costs and benefits of using a nonmarking system.
Write legibly if placing coding and dating information on price tickets by hand.
Use marking equipment to code and date merchandise.

ATTITUDES

Label merchandise with coding and dating information accurately and in a timely manner.
Recognize benefits of providing sell-by dates to customers.
In addition, refer to Employability Skills List.

SAFETY

Comply with all government regulations when dating merchandise.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Incoming merchandise
Price tickets
Marking equipment
Established coding and dating system
Pen or marker

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:
- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.

Mathematics:
- Goal 1-A: Ability to read, write and name numbers in several different ways.

Social Sciences:
- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Establish pricing policies

PERFORMANCE STANDARD Pricing policies will be written and will comply with all local, state and federal laws relative to pricing.

STEPS

1. Contact local, state and federal agencies to determine the existence of applicable pricing laws, regulations and court decisions.
2. Obtain and review copies of applicable pricing laws, regulations and recent court decisions.
3. Contact other successful entrepreneurs to identify and review pricing policies they have established.
4. Consider the following factors which affect pricing when establishing pricing policies:
    a. Competition.
    b. Customer reaction.
    c. Supply and demand.
    d. Possible markdowns.
    e. Laws regarding pricing.
5. Set pricing goals, such as the following:
    a. Achieving a certain percentage return on investment.
    b. Achieving a desired profit.
    c. Achieving a projected share of market.
    d. Achieving projected sales.
    e. Setting prices related to competition.
6. Identify areas, based on established pricing goals, for which pricing policies need to be written, such as the following:
    a. One-price policy.
    b. Variable-price policy.
    c. Price lining.
    d. Odd-cent pricing.
    e. Leader pricing.
    f. Competitive pricing.
    g. Promotional pricing.
    h. Multiple-unit pricing.
    i. Pricing to maintain store image and retail mix.
    j. Markup policy.
    k. Markdown policy.
7. Write business policies for each identified area.

KNOWLEDGE	Use terminology, such as cost, markon, markup, retail price, gross margin, markdown, markdown cancellation, markup as a percentage of retail, markup as a percentage of cost, initial markup, maintained markup, additional markup, markup cancellation, final sales price, fair-trade items, price reductions, automatic markdowns, expense, fixed expense, variable expense, overhead, multiple price, price lines, leader merchandising, loss leader, premium, marginal revenue, marginal cost, price fixing, price discrimination, resale price maintenance, deceptive pricing, cost-oriented pricing, markup pricing, cost-plus pricing, target-return pricing, demand-oriented pricing, perceived-value pricing, competitive-bid pricing, going-rate pricing, channel pricing, odd-even pricing, prestige pricing, promotional pricing and marketing mix. Determine need to establish pricing policies. Determine local, state and federal laws, regulations and court decisions which affect pricing policies. Stay current on local, state and federal laws, regulations and court decisions affecting pricing policies. Establish desired percentage for return on investment. Establish desired profit for year or season. Establish desired share of market. Establish desired projected sales. Determine how to set prices relative to competition, such as pricing below competition, pricing at same level as competition or pricing above competition. Apply economics of pricing. Recognize the role of price in marketing mix. Recognize the effect of price on profits. Determine pricing goals. Determine pricing policies to be developed. Analyze the costs and benefits of each potential pricing policy. Write legibly and clearly when developing pricing policies.
ATTITUDES	Recognize the importance of pricing in maintaining and enhancing the business image. Recognize the importance of complying with local, state and federal laws and regulations relative to pricing merchandise. Recognize the importance of keeping employees informed about pricing policies. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of lawsuit by complying with local, state and federal pricing laws and regulations.
EQUIPMENT AND MATERIALS	Copies of local, state and federal laws, regulations and court decisions relative to pricing Paper Pen or pencil

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Language Arts:

- Goal 1-A: Recognition, recall and summarization of material read.
- Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose.
- Goal 1-F: Integration of information from more than one text.
- Goal 2-C: Inferences from spoken messages and nonverbal cues.
- Goal 2-D: Distinction among different purposes in communication.
- Goal 2-E: Differing perspectives and points of view.
- Goal 2-F: Effective and appropriate responses.
- Goal 3-A: Use of appropriate language and style in writing for a variety of purposes and audiences.
- Goal 3-D: Clear, coherent, logical organization of ideas within the appropriate major discourse structures.
- Goal 3-E: Use of standard written English conventions.
- Goal 4-A: Clear and expressive speaking.
- Goal 4-D: Use of appropriate language and nonverbal cues for the topic, audience and setting.
- Goal 4-E: Use of language for a variety of purposes.
- Goal 6-D: English grammar.

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 1-M: Basic economic concepts that have traditionally shaped economic systems.
- Goal 1-N: Traditional, market and command economic systems.
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-G: Ways to utilize the various levels of government.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Price merchandise using ticketing machine

PERFORMANCE STANDARD Price tickets will contain accurate information and will be securely attached to merchandise using a ticketing machine.

STEPS

1. Obtain all ticketing materials:
    a. Appropriate price tickets.
    b. Appropriate fasteners.
    c. Appropriate ticketing machine.
    d. Price sheet and receiving reports (apron, invoice, purchase order, etc.).
2. Obtain merchandise to which to apply price tickets.
3. Determine what information needs to be printed on price ticket, if price ticket is not preprinted, such as:
    a. Retail price.
    b. Cost-price code.
    c. Season or date code.
    d. Expiration date.
    e. Size.
    f. Color.
    g. Material.
    h. Style number.
    i. Manufacturer or vendor number.
    j. Department and classification number.
    k. Stock-control code.
    l. Part number.
4. Count merchandise to determine number of price tickets to print, and compare count with that listed on receiving reports.
5. Locate any missing merchandise.
6. Set up price-ticketing machine to print needed information.
7. Load price tickets into price-ticketing machine.
8. Print price tickets.
9. Attach price tickets to merchandise.
10. Count all ticketed merchandise, and compare the count to the number on the receiving reports.
11. File price sheet and receiving reports for future reference.

KNOWLEDGE Analyze the costs and benefits of various types of price tickets and fasteners.
Determine the need to attach price tickets to merchandise.

KNOWLEDGE (Cont.)

Select appropriate price tickets, fasteners and ticketing machine for merchandise being ticketed.
Determine appropriate receiving reports to use to verify quantity of merchandise being ticketed.
Determine appropriate receiving reports from which to obtain information to print on price tickets.
Determine what information to print on price tickets.
Determine the need to count merchandise prior to attaching price tickets.
Locate and use parts of price-ticketing machine.
Determine the need to recount ticketed merchandise.
Use alphabetic and numeric filing systems.
Reduce the time needed to prepare price tickets and to attach them by using price-ticketing machines.

ATTITUDES

Print price tickets accurately.
Attach price tickets to merchandise in a timely manner.
Recognize the importance of properly priced and ticketed merchandise to employees and customers.
In addition, refer to Employability Skills List.

SAFETY

Reduce the risk of price tickets being altered or removed by using a price ticketing machine.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Merchandise needing price tickets
Price tickets
Price-ticketing machine
Price-ticket fasteners
Receiving reports
Price sheets

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Social Sciences:
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Price merchandise using price stamper

PERFORMANCE STANDARD Prices will be accurately stamped on merchandise.

STEPS

1. Obtain all ticketing materials:
    a. Price stamper.
    b. Ink pad.
    c. Price sheet and receiving reports (apron, invoice, purchase order, etc.).
2. Obtain merchandise on which to stamp prices.
3. Determine correct price to stamp on merchandise.
4. Count merchandise, and compare count with that listed on receiving reports.
5. Locate any missing merchandise.
6. Set up price stamper to print correct price.
7. Stamp correct price on merchandise.
8. Count all stamped merchandise, and compare the count to the number on the receiving reports.
9. File price sheet and receiving reports for future reference.

KNOWLEDGE

Analyze the costs and benefits of various types of price-stamping equipment.
Determine the need to stamp prices on merchandise.
Determine appropriateness of stamping price on specific merchandise.
Select appropriate stamping equipment for merchandise being priced.
Determine appropriate receiving reports to use to verify quantity of merchandise being priced.
Determine the need to count merchandise prior to pricing it.
Locate and use parts of price-stamping equipment.
Determine the need to recount priced merchandise.
Use alphabetic and numeric filing systems.

ATTITUDES

Stamp price on merchandise accurately and in a timely manner.
Recognize the importance of properly priced merchandise to employees and customers.
In addition, refer to Employability Skills List.

SAFETY	Reduce the risk of prices being changed on merchandise by stamping price on merchandise. Clean hands and clothing after using stamping equipment. Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."
EQUIPMENT AND MATERIALS	Merchandise needing prices Price-stamping equipment Stamp pad Receiving reports Price sheets
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Social Sciences: Goal 3-G: Selected types of antisocial behavior and various methods of intervention. Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems. Goal 5-B: Sources of information evaluated in terms of selective criteria. Goal 5-C: Costs and benefits of a particular course of action. Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Price merchandise using gummed tags

PERFORMANCE STANDARD Gummed tags will contain accurate information and will be securely attached to merchandise.

STEPS

1. Obtain all ticketing materials:
   a. Appropriate gummed tags.
   b. Appropriate ticketing machine.
   c. Price sheet and receiving reports (apron, invoice, purchase order, etc.).
2. Obtain merchandise to which to apply gummed tags.
3. Determine what information needs to be printed on gummed tags, if gummed tag is not preprinted, such as:
   a. Retail price.
   b. Cost-price code.
   c. Season or date code.
   d. Expiration date.
   e. Size.
   f. Color.
   g. Material.
   h. Style number.
   i. Manufacturer or vendor number.
   j. Department and classification number.
   k. Stock-control code.
   l. Part number.
4. Count merchandise to determine number of gummed tags to print, and compare count with that listed on receiving reports.
5. Locate any missing merchandise.
6. Set up price-tagging machine to print needed information.
7. Load gummed tags into price-tagging machine.
8. Print gummed price tags.
9. Attach price tags to merchandise.
10. Count all tagged merchandise, and compare the count to the number on the receiving reports.
11. File price sheet and receiving reports for future reference.

KNOWLEDGE

Analyze the costs and benefits of various types of gummed tags.
Determine the need to attach price tags to merchandise.
Select appropriate gummed tags and ticketing machine for merchandise being tagged.

KNOWLEDGE (Cont.)

Determine appropriate receiving reports to use to verify quantity of merchandise being tagged.
Determine appropriate receiving reports from which to obtain information to print on gummed tags.
Determine what information to print on gummed tags.
Determine the need to count merchandise prior to attaching gummed tags.
Locate and use parts of price-tagging machine.
Determine the need to recount tagged merchandise.
Use alphabetic and numeric filing systems.
Reduce the time needed to prepare gummed tags and apply them by using price-tagging machines.

ATTITUDES

Print gummed tags accurately.
Apply gummed tags to merchandise in a timely manner.
Recognize the importance of properly priced and tagged merchandise to employees and customers.
In addition, refer to Employability Skills List.

SAFETY

Reduce the risk of gummed tags being altered by using a price-tagging machine.
Reduce the risk of gummed tags being removed from merchandise by using tags that split apart when being removed.
Observe safety warnings printed on specific equipment being used, such as "Keep fingers, hair, jewelry, etc., from this area."

EQUIPMENT AND MATERIALS

Merchandise needing gummed price tags
Gummed tags
Price-tagging machine
Receiving reports
Price sheets

SOURCE OF ANALYSIS

Summary of available resources.
Input from small business owners/operators.

ILLINOIS STATE GOALS FOR LEARNING

Social Sciences:
- Goal 3-G: Selected types of antisocial behavior and various methods of intervention.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-M: Management of human and material resources.

TASK ANALYSIS

OCCUPATION Small Business Owner/Operator

DUTY AREA Performing Merchandising Duties

TASK Establish price for merchandise

PERFORMANCE STANDARD Establish price for merchandise (not covered by fair-trade regulations) so established pricing goals will be met.

STEPS

1. Review established pricing policies and goals.
2. Determine which merchandise is classified as fair trade and will need to be sold at a fixed price.
3. Calculate markup percentage for fair-trade merchandise using electric/electronic calculator.
4. Compare markup percentage for fair-trade merchandise with that established in pricing goals.
5. Establish initial markup percentage (average markup percentage) for all merchandise which does not carry a fixed price:
    a. Determine variable expenses.
    b. Determine fixed expenses.
    c. Establish desired (reasonable) profit.
    d. Estimate price reductions (shortages, markdowns, discounts, etc.).
    e. Estimate sales for period (season, year, etc.), and reduce this amount by the total sales estimated from fair-trade merchandise.
    f. Calculate the dollar markup amount for fair-trade merchandise using electric/electronic calculator.
    g. Calculate the dollar markup amount for all merchandise, using electric/electronic calculator; and reduce that amount by the dollar markup amount for fair-trade merchandise.
    h. Use electric/electronic calculator to calculate initial markup percentage (average markup percentage) using adjusted sales and markup amounts.
6. Determine which merchandise will carry a higher-than-average markup, such as:
    a. Exclusive goods, fad items, etc.
    b. Merchandise with a high risk of shortages.
    c. Merchandise with an excessive expense for handling and storage (large merchandise that requires large amounts of selling and storage space or requires special delivery).
    d. Merchandise with a low rate of stock turn.

STEPS
(Cont.)

7. Determine which merchandise will carry a lower-than-average markup, such as:
    a. Staple goods.
    b. Merchandise with a low risk of shortages.
    c. Merchandise with a low risk of price reductions.
    d. Merchandise which requires a small amount of selling and storage space and does not require any special delivery.
    e. Merchandise with a high rate of stock turn.
    f. Merchandise which will have increased sales volume due to lower markup.
8. Set initial markup percentage for each type of merchandise making sure that the average markup percentage is equal to the established goal.
9. Determine merchandise price of competitors.
10. Calculate retail price needed to meet desired markup percentage using electric/electronic calculator.
11. Adjust price as needed to keep in line with pricing policies.
12. Prepare a price sheet for all merchandise to be used when marking prices on merchandise.

KNOWLEDGE

Use terminology, such as cost, markon, retail price, gross margin, markdown, markup, markup as a percentage of retail, markup as a percentage of cost, initial markup, maintained markup, final sales price, fair-trade items, price reductions, automatic markdowns, expense, fixed expense, variable expense, overhead, multiple price, price lines, leader merchandising, loss leader, premium, marginal revenue, marginal cost, price fixing, price discrimination, resale price maintenance, deceptive pricing, cost-oriented pricing, markup pricing, cost-plus pricing, target-return pricing, demand-oriented pricing, perceived-value pricing, demand-differential pricing, competition-oriented pricing, competitive-bid pricing, going-rate pricing, channel pricing, odd-even pricing, prestige pricing, promotional pricing, sale, special purchase and clearance.

Use electric/electronic calculator to calculate the following: markup in dollars, cost price, retail price, markup percentage (retail), markup percentage (cost), initial markup, maintained markup, cost price, retail price, markdown, markdown percentage, marginal revenue, marginal cost, stock turn rate based on selling price, stock turn rate based on cost, stock turn rate based on units, gross profit on merchandise investment and average inventory investment.

Determine laws and court decisions which affect pricing of merchandise.

Stay current on local, state and federal laws, regulations and court decisions affecting pricing of merchandise.

Apply economics of pricing.

Recognize the role of price in marketing mix.

KNOWLEDGE (Cont.)	Recognize the effect of price on profits. Recognize the effect of price on customers. Set prices to meet established pricing goals. Write legibly when preparing price sheet. Locate and use parts of electric/electronic calculator.
ATTITUDES	Recognize the importance of pricing in maintaining and enhancing the business image. Recognize the importance of complying with local, state and federal laws, regulations and court decisions relative to pricing merchandise. In addition, refer to Employability Skills List.
SAFETY	Reduce risk of lawsuit by complying with local, state and federal pricing laws and regulations.
EQUIPMENT AND MATERIALS	Established pricing policies and goals Financial reports for previous reporting period Electric/electronic calculator Pen or pencil Blank pricing sheets Copies of local, state and federal laws, regulations and court decisions relative to pricing merchandise
SOURCE OF ANALYSIS	Summary of available resources. Input from small business owners/operators.
ILLINOIS STATE GOALS FOR LEARNING	Language Arts: Goal 1-A: Recognition, recall and summarization of material read. Goal 1-C: Reading for various purposes and identification of text to accomplish each purpose. Goal 1-F: Integration of information from more than one text.

ILLINOIS
STATE GOALS
FOR
LEARNING
(Cont.)

Mathematics:

- Goal 1-A: Ability to read, write and name numbers in several different ways.
- Goal 1-B: Ability to perform operations with numbers with and without a calculator.
- Goal 1-H: Application of computational and problem-solving skills to common life situations with or without calculators.
- Goal 2-A: Interpretation of ratios.
- Goal 2-B: Construction and solution of proportions.
- Goal 2-C: Application of ratios and proportions to real-life situations.
- Goal 2-D: Interpretations of percents in various settings.
- Goal 2-E: Application of percents in real-life situations.
- Goal 4-C: Translation of verbal descriptions into algebraic expressions, equations or inequalities and vice versa.
- Goal 4-D: Ability to evaluate, solve and apply formulas with and without calculators.
- Goal 7-A: Rounding numbers.
- Goal 7-B: Estimation of present and future values from graphs or numerical information.
- Goal 7-D: Ability to determine whether an estimate is a better alternative than an exact value.

Social Sciences:

- Goal 1-H: Economic impacts of political decisions made by federal, state and local governments.
- Goal 1-O: Effects of basic economic principles on producers and consumers in the public and private sectors.
- Goal 5-A: Rational decision-making processes based on goals, values and needs applied to selected consumer and social problems.
- Goal 5-B: Sources of information evaluated in terms of selective criteria.
- Goal 5-C: Costs and benefits of a particular course of action.
- Goal 5-D: Interdependent roles of an individual as a consumer, a producer and a citizen in the United States economic/political/social system.
- Goal 5-M: Management of human and material resources.

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Education
For
Employment
Task Lists

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

1988

CLUSTER MATRICES

FOR

BUSINESS, MARKETING
AND MANAGEMENT OCCUPATIONS

ICBVE
"KEY TO EFFECTIVE LEARNING"

Illinois Competency Based Vocational
Education Project
Housed At: Lake County Area
Vocational Center
19525 West Washington Street
Grayslake, IL 60030-1194
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Cluster Matrices Developed by CBVE Business, Marketing, and Management Consultant	Linda Lafferty Fonseca
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Education
For
Employment
Task Lists

Illinois
State Board of
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Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

ACCOUNTING–BOOKKEEPING CLUSTER

- Bookkeeper
- Bookkeeper–Machine Operator
- Payroll Clerk
- Payroll Clerk, Data Processing
- Accounting Clerk
- Accounting Clerk, Data Processing
- *Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these matrices form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

These materials were prepared under contract with the Illinois State Board of Education, Department of Adult, Vocational and Technical Education ("Illinois Competency Based Vocational Education Project," contract number PS-10-130).

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

BK = Bookkeeper
BM = Bookkeeping-Machine Operator
PC = Payroll Clerk
PD = Payroll Clerk, Data Processing
AC = Accounting Clerk
AD = Accounting Clerk, Data Processing

RECORDING ENTRIES IN JOURNALS AND LEDGERS

		BK	BM	PC	PD	AC	AD
205A001	Record accounting entries for cash payments using manual bookkeeping system	X				X	
205A002	Record accounting entries to adjust account using manual bookkeeping system	X				X	
205A003	Record accounting entries for buying merchandise on account using manual bookkeeping system	X				X	
205A004	Record accounting entries using peg board	X				X	
205A005	Record accounting entries in combination journal using manual bookkeeping system	X				X	
205A006	Record accounting entries pertaining to notes and interest using manual bookkeeping system	X				X	
205A007	Record payroll tax accounting entries using manual bookkeeping system	X				X	
205A008	Record cash receipts accounting entries using manual bookkeeping system	X				X	
205A009	Record sales tax accounting entries using manual bookkeeping system	X				X	
205A010	Record accounting entries pertaining to accrued interest income using manual bookkeeping system	X				X	
205A011	Record accounting entries pertaining to accrued interest expense using manual bookkeeping system	X				X	
205A012	Post to ledger account from journals using manual bookkeeping system	X				X	
205A013	Record accounting entries pertaining to corporation income tax using manual bookkeeping system	X				X	
205A014	Post directly to ledger from source document using manual bookkeeping system	X				X	
205A015	Post from cash journals using manual bookkeeping system	X				X	
205A016	Record accounting entries for selling merchandise on account using manual bookkeeping system	X				X	
205A017	Record accounting entries pertaining to payroll using manual bookkeeping system	X				X	
205A018	Correct errors indicated by trial balance	X				X	
205A019	Write receipts for checks and cash sales	X				X	
205A020	Record accounting entries for cash payments using bookkeeping machine		X				
205A021	Record accounting entries to adjust accounts using bookkeeping machine		X				
205A022	Record accounting entries for buying merchandise on account using bookkeeping machine		X				
205A023	Record accounting entries in combination journal using bookkeeping machine		X				
205A024	Record accounting entries pertaining to notes and interest using bookkeeping machine		X				
205A025	Record accounting entries pertaining to payroll tax using bookkeeping machine		X				

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

		BK	BM	PC	PD	AC	AD
205A026	Record accounting entries pertaining to cash receipts using bookkeeping or billing machine		X				
205A027	Record accounting entries pertaining to sales tax using bookkeeping machine		X				
205A028	Record accounting entries pertaining to accrued interest income using bookkeeping machine		X				
205A029	Post to ledger account from journals using bookkeeping machine		X				
205A030	Record accounting entries pertaining to corporation income tax using bookkeeping machine		X				
205A031	Post directly to ledger from source documents using bookkeeping machine		X				
205A032	Post from cash journals using bookkeeping machine		X				
205A033	Record accounting entries for selling merchandise on account using bookkeeping or billing machine		X				
205A034	Record accounting entries pertaining to payroll using bookkeeping machine		X				
205A035	Correct errors indicated by trial balance using bookkeeping machine		X				
205A036	Record accounting entries pertaining to accrued interest expense using bookkeeping machine		X				
205A037	Input accounting entries for buying merchandise on account using computer system						X
205A038	Input accounting entries for cash payments using computer system						X
205A039	Input accounting entries for selling merchandise on account using computer system						X
205A040	Input accounting entries pertaining to cash receipts using computer system						X
205A041	Post from cash journals using computer system						X
205A042	Input accounting entries pertaining to sales tax using computer system						X
205A043	Input accounting entries in a combination journal using computer system						X
205A044	Input accounting entries pertaining to notes and interest using computer system						X
205A045	Input accounting entries pertaining to accrued interest income using computer system						X
205A046	Input accounting entries pertaining to accrued interest expense using computer system						X
205A047	Input accounting entries pertaining to payroll using computer system						X
205A048	Input accounting entries pertaining to payroll tax using computer system						X
205A049	Input accounting entries pertaining to corporation income tax using computer system						X
205A050	Input accounting entries to adjust account using computer system						X
205A051	Post directly to ledger from source documents using computer system						X
205A052	Post to ledger account from journals using computer system						X
205A053	Input corrections for errors indicated by trial balance using computer system						X

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

		BK	BM	PC	PD	AC	AD
205A054	Input entries to general ledger that do not affect subsidiary ledgers using computer system						X
205A055	Input accounts payable transactions using computer system						X
205A056	Input accounts receivable transactions using computer system						X

ACCOMPLISHING PAYROLL ACTIVITIES

		BK	BM	PC	PD	AC	AD
205B001	Prepare payroll using manual payroll system	X		X			
205B002	Process salary adjustments manually	X		X		X	
205B003	Prepare individual employee's earnings record manually	X		X		X	
205B004	Prepare salesperson's commission statements manually	X		X		X	
205B005	Prepare payroll statements manually	X		X			
205B006	Prepare employee's form W-2 manually	X		X			
205B007	Prepare employer's quarterly federal tax returns manually (Form 941)	X		X			
205B008	Prepare federal tax deposits	X	X	X			
205B009	Prepare employer's quarterly state tax returns manually	X		X			
205B010	Prepare state tax deposits	X	X	X			
205B011	Prepare employer's annual reconciliation reports of income tax withheld manually (Form W-3)	X		X			
205B012	Prepare employer's federal unemployment tax report manually (Form 940)	X		X			
205B013	Prepare state unemployment tax report manually	X		X			
205B014	Prepare FICA tax reports manually	X		X			
205B015	Distribute payroll checks			X	X		
205B016	Input data to process payroll using computer system				X		
205B017	Input data to prepare individual employee's earnings record using computer system				X		
205B018	Input data to make salary adjustments using computer system				X		
205B019	Input data to prepare salesperson's commission statements using computer system				X		
205B020	Input data to prepare payroll statements using computer system				X		
205B021	Prepare employee's form W-2 using computer system				X		
205B022	Prepare employer's quarterly federal tax returns using computer system (Form 941)				X		
205B023	Prepare employer's quarterly state tax returns using computer system				X		
205B024	Prepare employer's annual reconciliation reports of income tax withheld using computer system (Form W-3)				X		
205B025	Prepare employer's annual federal unemployment tax report using computer system (Form 940)				X		
205B026	Prepare state unemployment tax report using computer system				X		
205B027	Prepare FICA tax reports using computer system				X		
205B028	Prepare payroll using bookkeeping machine		X				
205B029	Prepare individual employee's earnings record using bookkeeping machine		X				
205B030	Prepare salesperson's commission statements		X				
205B031	Prepare payroll statements using bookkeeping machine		X				

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

		BK	BM	PC	PD	AC	AD
205B032	Prepare employee's form W-2 using bookkeeping machine		X				
205B033	Prepare employer's quarterly federal tax returns using bookkeeping machine (Form 941)		X				
205B034	Prepare employer's quarterly state tax returns using bookkeeping machine		X				
205B035	Prepare employer's annual reconciliation reports of income tax withheld using bookkeeping machine (Form W-3)		X				
205B036	Prepare state unemployment tax report using bookkeeping machine		X				
205B037	Prepare employer's annual federal unemployment tax report using bookkeeping machine (Form 940)		X				
205B038	Process salary adjustments using bookkeeping machine		X				
205B039	Prepare FICA tax reports using bookkeeping machine		X				
205B040	Prepare payroll to be processed on computer system	X		X	X		
205B041	Post payroll deductions using manual bookkeeping system					X	

PERFORMING CLERICAL ACTIVITIES

		BK	BM	PC	PD	AC	AD
205C001	Duplicate materials on photocopying machine	X	X	X	X	X	X
205C002	Process outgoing mail	X	X	X	X	X	X
205C003	Process incoming mail	X	X	X	X	X	X
205C004	Set up new files	X	X	X	X	X	X
205C005	File materials using alphabetic filing system	X	X	X	X	X	X
205C006	File materials using numeric filing system	X	X	X	X	X	X
205C007	File materials using subject filing system	X	X	X	X	X	X
205C008	Verify calculations on source documents using calculator	X	X			X	
205C009	Process incoming telephone calls	X	X	X	X	X	X
205C010	Process outgoing telephone calls	X	X	X	X	X	X
205C011	Record outgoing long distance telephone calls	X	X	X	X	X	X
205C012	Clean and straighten up work area	X	X	X	X	X	X
205C013	Equip work station with office supplies and office forms	X	X	X	X	X	X
205C014	Prepare shipment for freight express	X	X				
205C015	Type business letters from rough draft	X	X				
205C016	Type tabulated materials	X	X				
205C017	Maintain accounting procedures manual	X	X				
205C018	Manage office supplies	X	X				
205C019	Verify calculations on source documents using computer system						X
205C020	Maintain payroll processing procedures manual			X	X		
205C021	Perform data protection procedures during power failure				X		X
205C022	Perform power conservation and data protection procedures during air conditioning failure				X		X
205C023	Follow procedures to maintain confidentiality of data				X		X
205C024	Maintain system access security				X		X
205C025	Prioritize work	X	X	X	X	X	X

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

MAINTAINING OFFICE EQUIPMENT

		BK	BM	PC	PD	AC	AD
205D001	Change ribbon on bookkeeping machine		X				
205D002	Clean bookkeeping machine		X				
205D003	Change paper in bookkeeping machine		X				
205D004	Repair minor equipment malfunctions on bookkeeping machine		X				
205D005	Recommend service on bookkeeping machine		X				
205D006	Change ribbon on printer				X		X
205D007	Perform maintenance functions on photocopier, such as changing toner and replacing paper	X	X	X	X	X	X
205D008	Repair minor equipment malfunctions	X		X	X	X	X
205D009	Recommend service on equipment	X		X	X	X	X
205D010	Load/change paper in printer				X		X
205D011	Change ribbons on calculators			X			
205D012	Change paper tapes on calculators or adding machines	X		X		X	
205D013	Clean calculators			X			
205D014	Change office equipment ribbons	X				X	
205D015	Clean office equipment	X			X	X	X
205D016	Replace paper and ribbons on office machines	X	X			X	
205D017	Report equipment malfunctions to supervisor				X		X
205D018	Record operating and down time				X		X

PROCESSING EMPLOYEE BENEFITS

		BK	BM	PC	PD	AC	AD
205E001	Complete individual record of employment			X			
205E002	Process employee pension plan documents			X			
205E003	Process employee dental insurance documents			X			
205E004	Process employee health insurance documents			X			
205E005	Process employee life insurance documents			X			
205E006	Process documents relating to employee sick leave			X			
205E007	Process documents relating to employee vacation leave			X			
205E008	Process documents relating to employee disability leave			X			
205E009	Process documents relating to employee leave of absence, such as jury duty or military leave			X			
205E010	Process documents relating to employee savings plan			X			
205E011	Process documents relating to employee credit union			X			
205E012	Prepare benefit termination forms			X			
205E013	Prepare worker's compensation forms			X			
205E014	Input data to complete individual record of employment				X		
205E015	Input data relating to employee pension plan				X		
205E016	Input data relating to employee dental insurance				X		
205E017	Input data relating to employee health insurance				X		
205E018	Input data relating to employee life insurance				X		
205E019	Input data relating to employee sick leave				X		
205E020	Input data relating to employee vacation leave				X		
205E021	Input data relating to employee disability leave				X		
205E022	Input data relating to employee leave of absence, such as jury duty or military leave				X		
205E023	Input data relating to employee savings plan				X		

		BK	BM	PC	PD	AC	AD
205E024	Input data relating to employee credit union				X		
205E025	Input data to prepare benefit termination forms				X		
205E026	Input data relating to worker's compensation forms				X		

MAINTAINING EMPLOYEE PAYROLL RECORDS

		BK	BM	PC	PD	AC	AD
205F001	Input data for new employee record in master employee file using computer system				X		
205F002	Input data to change employee record in master employee file				X		
205F003	Input data to remove employee record from master employee file				X		
205F004	Input data to keep record of daily attendance of employees				X		
205F005	Enter data for new employee in master employee file manually			X			
205F006	Process changes to employee records manually			X			
205F007	Remove employee record from master file manually			X			
205F008	Keep record of daily attendance of employees			X			

ACCOMPLISHING GENERAL ACCOUNTING/BANKING RELATED ACTIVITIES

		BK	BM	PC	PD	AC	AD
205G001	Process cash sale using cash register	X	X				
205G002	Process cash received on account using cash register	X	X				
205G003	Process charge sale using cash register	X	X				
205G004	Process sales return using cash register	X	X				
205G005	Process cash payment on account using cash register	X	X				
205G006	Process accounts payable invoices using bookkeeping machine		X				
205G007	Record discounts allowable on invoices using bookkeeping machine		X				
205G008	Fill out purchase order invoices	X	X			X	
205G009	Record daily sales on unit control forms	X	X			X	
205G010	Prepare credit memos for goods returned	X	X			X	
205G011	Prepare bill of sale	X	X			X	
205G012	Prepare accounting data for computer processing	X				X	
205G013	Process accounts payable invoices in manual bookkeeping system	X				X	
205G014	Prepare reconciliation correction sheets for changes to computer generated reports	X				X	
205G015	Record discounts allowable on invoices	X	X			X	
205G016	Reconcile bank statements using calculator	X	X			X	
205G017	Make bank deposits	X	X				
205G018	Maintain petty cash fund	X	X				
205G019	Process checks	X	X				
205G020	Process returned checks	X	X			X	

ACCOMPLISHING PERIODIC ACCOUNTING/REPORTING ACTIVITIES

		BK	BM	PC	PD	AC	AD
205H001	Open bookkeeping system on new business using bookkeeping machine		X				
205H002	Foot, prove and rule cash journals on bookkeeping machine		X				
205H003	Prepare post-closing trial balance using bookkeeping machine		X				

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

		BK	BM	PC	PD	AC	AD
205H004	Prepare income statement using bookkeeping machine		X				
205H005	Prepare capital statement using bookkeeping machine		X				
205H006	Prepare balance sheet using bookkeeping machine		X				
205H007	Prepare schedule of accounts payable using bookkeeping machine		X				
205H008	Prepare schedule of accounts receivable using bookkeeping machine		X				
205H009	Prepare schedule of cost of goods sold using bookkeeping machine		X				
205H010	Prepare customer's statement of accounts using bookkeeping machine		X				
205H011	Prepare invoices for payment due using bookkeeping machine		X				
205H012	Prepare cash disbursement sheets using bookkeeping machine		X				
205H013	Prepare checks to pay bills for business using bookkeeping machine		X				
205H014	Record closing journal entries using bookkeeping machine		X				
205H015	Prepare worksheet using bookkeeping machine		X				
205H016	Record opening entries for new business using manual bookkeeping system	X				X	
205H017	Foot, prove and rule cash journals	X				X	
205H018	Prepare post-closing trial balance using calculator	X				X	
205H019	Prepare income statement using calculator	X				X	
205H020	Prepare capital statements using calculator	X				X	
205H021	Prepare balance sheet using calculator	X				X	
205H022	Prepare schedule of accounts payable using calculator	X				X	
205H023	Prepare schedule of accounts receivable using calculator	X				X	
205H024	Prepare schedule of cost of goods sold using calculator	X				X	
205H025	Prepare customer's statement of accounts	X				X	
205H026	Prepare invoices for payments due	X				X	
205H027	Prepare cash disbursements sheets	X					
205H028	Take inventory	X	X			X	
205H029	Write checks to pay bills for business	X				X	
205H030	Record closing journal entries using manual bookkeeping system	X				X	
205H031	Prepare worksheet using manual bookkeeping system	X					
205H032	Input accounting entries to open bookkeeping system for new business using computer system						X
205H033	Input closing journal entries using computer system						X
205H034	Foot and prove cash journals on computer system						X
205H035	Print worksheet using computer system						X
205H036	Print post-closing trial balance using computer system						X
205H037	Print income statement using computer system						X
205H038	Print capital statement using computer system						X
205H039	Print balance sheet using computer system						X
205H040	Print schedule of accounts payable using computer system						X
205H041	Print schedule of accounts receivable using computer system						X

ACCOUNTING-BOOKKEEPING CLUSTER MATRIX

		BK	BM	PC	PD	AC	AD
205H042	Print schedule of cost of goods sold using computer system						X
205H043	Print invoices for payments due using computer system						X
205H044	Print customer's statement of accounts using computer system						X
205H045	Print cash disbursement reports using computer system						X
205H046	Print checks to pay bills for business using computer system						X
205H047	Type periodic reports and statements					X	
205H048	Build general ledger chart of accounts using computer system						X
205H049	Build accounts payable ledger chart of accounts using computer system						X
205H050	Build accounts receivable ledger chart of accounts using computer system						X
205H051	Input opening balances for general ledger accounts using computer system						X
205H052	Input opening balances for vendor accounts using computer system						X
205H053	Input opening balances for customer accounts using computer system						X
205H054	Prepare end-of-fiscal-period reports using computer system						X

**Education
For
Employment
Task Lists**

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

COMPUTER OPERATION AND PROGRAMMING CLUSTER

Computer Operator
Business Computer Programmer
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these matrices form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

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COMPUTER OPERATION AND PROGRAMMING CLUSTER MATRIX

CO = Computer Operator
BCP = Business Computer Programmer

PROCESSING DATA USING COMPUTER EQUIPMENT

		CO	BCP
220A001	Sequence jobs to be run	X	
220A002	Perform power-on procedures	X	
220A003	Prepare job control parameters	X	
220A004	Perform power-off procedures	X	
220A005	Obtain forms needed for job	X	
220A006	Mount carriage control tape	X	
220A007	Mount disk packs	X	
220A008	Mount tapes	X	
220A009	Input data using card reader	X	
220A010	Duplicate cards using card punch	X	
220A011	Correct cards using card punch	X	
220A012	Load operating system	X	
220A013	Load programs, files or data bases	X	
220A014	Run programs using time-sharing system	X	
220A015	Input data via operator's console	X	
220A016	Monitor data processing via console	X	
220A017	Transmit data to remote users	X	
220A018	Receive data from remote users	X	
220A019	Perform halt/restart procedures	X	
220A020	Run tests on programs	X	
220A021	Copy files for backup or media conversion	X	
220A022	Perform shift turnover procedures	X	
220A023	Remove output from machine	X	

MAINTAINING OFFICE EQUIPMENT

		CO	BCP
220B001	Clear card jam	X	
220B002	Clear paper jam	X	
220B003	Load/change paper in printer	X	
220B004	Change ribbon on printer	X	
220B005	Report equipment malfunctions to supervisor	X	
220B006	Record operating and down time	X	
220B007	Repair minor equipment malfunctions	X	
220B008	Recommend service on equipment	X	
220B009	Clean equipment	X	
220B010	Clean card readers, printers and tape drives	X	

MAINTAINING TAPE AND DISK PACK LIBRARY

		CO	BCP
220C001	Initialize disk packs	X	
220C002	Initialize tapes	X	
220C003	Cut tape and position new load point markers	X	
220C004	Prepare external tape and disk pack labels	X	
220C005	File disk packs and tapes	X	
220C006	Research internal label discrepancies	X	
220C007	Restore lost data onto disk packs and tapes	X	

PERFORMING CLERICAL ACTIVITIES

		CO	BCP
220D001	Process incoming telephone calls	X	X
220D002	Process outgoing telephone calls	X	X

COMPUTER OPERATION AND PROGRAMMING CLUSTER MATRIX

		CO	BCP
220D003	Perform data protection procedures during power failure	X	
220D004	Perform power conservation and data protection procedures during air conditioning failure	X	
220D005	Update operator's manual	X	
220D006	Follow procedures to maintain confidentiality of data	X	X
220D007	Maintain security of computer facility	X	
220D008	Maintain system access security	X	
220D009	Clean and straighten up work area	X	X
220D010	Equip work station with supplies and forms	X	X
220D011	Prepare worker production log	X	
220D012	Record outgoing long distance telephone calls	X	
220D013	Update programmer's manual		X

PROCESSING INCOMING JOBS AND FINAL OUTPUT

		CO	BCP
220E001	Keep log of processing jobs	X	
220E002	Submit jobs for computer processing	X	
220E003	Determine status of processed and pending jobs	X	
220E004	Verify computer output against user request specifications	X	
220E005	Observe for abnormal termination of jobs	X	
220E006	Burst and decollate output	X	
220E007	Distribute output	X	
220E008	File printouts, processed forms, punched cards or job instruction sheets	X	

PERFORMING PROGRAMMING SUPERVISORY FUNCTIONS

		CO	BCP
220H001	Consult with systems designer on programming requirements of new systems		X
220H002	Edit computer program for efficient use of memory		X
220H003	Function as part of a team to solve user problem(s)		X
220H004	Function as part of a team to solve existing programming problems		X
220H005	Maintain programming library		X
220H006	Recommend modifications of systems to management		X
220H007	Recommend modifications of systems to user(s)		X
220H008	Evaluate documentation of a program before coding		X

ANALYZING PROGRAMMING PROBLEMS

		CO	BCP
220I001	Develop program design following user specifications and company programming guidelines		X
220I002	Determine solutions to possible programming problems		X
220I003	Design input record layouts		X
220I004	Design output format		X
220I005	Design screen format		X
220I006	Analyze security needs for on-line system		X
220I007	Analyze security needs for batch system		X
220I008	Review existing subroutine(s) for application to a job		X
220I009	Review existing utility program(s) for application to a job		X
220I010	Design communications network		X
220I011	Design backup procedures for on-line system		X
220I012	Design backup procedures for batch system		X

COMPUTER OPERATION AND PROGRAMMING CLUSTER MATRIX

		CO	BCP
220I013	Design error-recovery procedures for on-line system		X
220I014	Design error-recovery procedures for batch system		X

FLOWCHARTING SOLUTIONS TO PROGRAMMING PROBLEMS

		CO	BCP
220J001	Develop general logic sequence for program		X
220J002	Prepare detail flowchart for coding program		X
220J003	Prepare detail flowchart for final documentation		X
220J004	Prepare system flowchart		X

CODING PROGRAMS

		CO	BCP
220K001	Adapt programs to process on different computer configurations		X
220K002	Code business-related applications programs using programming languages, such as COBOL, BASIC and PASCAL		X
220K003	Code parameters to use utility program		X
220K004	Code program routine		X
220K005	Code job control (JCL) statements compatible with operating system		X
220K006	Record remarks or comments in programs		X

TESTING PROGRAMS

		CO	BCP
220L001	Develop sample data for use in program testing		X
220L002	Run system test using sample data		X
220L003	Analyze computer output for accuracy following test run		X
220L004	Analyze program processing efficiency		X
220L005	Debug program without using computer aids		X
220L006	Debug program using computer aids		X
220L007	Desk check source program for errors prior to assembly or compilation		X
220L008	Desk check source program for errors after assembly or compilation		X
220L009	Recommend solutions to undesirable condition(s) discovered during test		X
220L010	Consult with user or systems analyst on test output		X

DOCUMENTING PROGRAMS

		CO	BCP
220M001	Define work files		X
220M002	Develop documentation narrative		X
220M003	Develop cross-reference of all programs in library		X
220M004	Prepare console operator's run book		X
220M005	Update console operator's run book with modifications		X
220M006	Prepare instructional worksheets for data control		X
220M007	Write definition of input and output		X
220M008	Write detailed description of data base		X
220M009	Prepare user's manual		X

PERFORMING PROGRAM MAINTENANCE

		CO	BCP
220N001	Update documentation for program		X
220N002	Update existing program with changes		X
220N003	Correct program error using program documentation		X

COMPUTER OPERATION AND PROGRAMMING CLUSTER MATRIX

		CO	BCP
220N004	Correct program error without program documentation		X
220N005	Correct program when "blow-up" occurs		X
220N006	Modify computer program for increased flexibility		X
220N007	Retest entire system when modification involves several programs		X

Education For Employment Task Lists

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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

INFORMATION PROCESSING CLUSTER

- Word Processor
- Information Specialist
- Terminal Operator
- Information Processing Manager
- Records Management Analyst
- *Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these matrices form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

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INFORMATION PROCESSING CLUSTER MATRIX

WP = Word Processor
IS = Information Specialist
TO = Terminal Operator
IPM = Information Processing Manager
RM = Records Management Analyst

INPUTTING AND STORING DOCUMENTS AND FILES

		WP	IS	TO	IPM	RM
240A001	Initialize diskettes	X	X			
240A002	Key correspondence from longhand or edited rough draft	X	X			
240A003	Key correspondence from machine transcription	X	X			
240A004	Key business reports or manuscripts from longhand or edited rough draft	X	X			
240A005	Key business reports or manuscripts from machine transcription	X	X			
240A006	Key meeting minutes from longhand or edited rough draft	X	X			
240A007	Key meeting minutes from machine transcription	X	X			
240A008	Key outlines from longhand or edited rough draft	X	X			
240A009	Key outlines from machine transcription	X	X			
240A010	Key agenda from longhand or edited rough draft	X	X			
240A011	Key agenda from machine transcription	X	X			
240A012	Key news release from longhand or edited rough draft	X	X			
240A013	Key news release from machine transcription	X	X			
240A014	Input data using optical character recognition equipment	X	X			
240A015	Input data into spreadsheet formats	X	X	X		
240A016	Input data to prepare graphs and charts	X	X	X		
240A017	Input data into data base files	X	X	X		
240A018	Key mailing labels or envelopes	X	X			
240A019	Key tabular information	X	X			
240A020	Create backup files	X	X	X		
240A021	Create glossary file	X	X			
240A022	Store repetitive material	X	X			
240A023	Update spelling dictionary	X	X			

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

		WP	IS	TO	IPM	RM
240B001	Proofread document for content, format and typographical errors	X	X			
240B002	Move (rearrange) text	X	X			
240B003	Search and replace text	X	X			
240B004	Insert and delete text	X	X			
240B005	Rename files	X	X			
240B006	Insert end-of-line hyphens into text	X	X			
240B007	Prepare new document from existing documents	X	X			
240B008	Update existing records in data base files	X	X	X		
240B009	Update data on spreadsheets	X	X	X		
240B010	Update data on graphs and charts	X	X	X		
240B011	Verify data and correct errors	X	X			
240B012	Delete text or data from storage	X	X	X		
240B013	Copy one diskette to another	X	X			
240B014	Add data to the backup files	X	X	X		
240B015	Delete data from backup files	X	X	X		
240B016	Process text and data using integrated software	X	X	X		

INFORMATION PROCESSING CLUSTER MATRIX

PRINTING, DISTRIBUTING AND RECEIVING OUTPUT

		WP	IS	TO	IPM	RM
240C001	Print documents or reports using continuous-feed (fanfold or pinfeed) paper	X	X			
240C002	Print documents or reports using single-sheet paper	X	X			
240C003	Print documents by interfacing word processing equipment with phototypesetting equipment	X	X			
240C004	Print information according to sort criteria	X	X			
240C005	Transmit data via modem	X	X			
240C006	Receive data via modem	X	X			
240C007	Separate continuous-feed forms or paper	X	X			
240C008	Sort completed jobs for distribution	X	X			
240C009	Print mailing labels or envelopes	X	X			

MAINTAINING OFFICE EQUIPMENT

		WP	IS	TO	IPM	RM
240D001	Change ribbon on word processing unit	X	X			
240D002	Repair minor equipment malfunctions	X	X	X		
240D003	Recommend service on equipment	X	X	X		
240D004	Perform maintenance functions on photocopier, such as changing toner and replacing paper	X				
240D005	Clean equipment	X	X	X		
240D006	Change ribbon on printer	X	X			
240D007	Change printwheel on printer	X	X			
240D008	Load/change paper in printer	X	X			
240D009	Report equipment malfunctions to supervisor	X	X	X		
240D010	Record operating and down time	X	X	X		

PERFORMING CLERICAL ACTIVITIES

		WP	IS	TO	IPM	RM
240E001	Clean and straighten up work area	X	X	X	X	
240E002	Verify calculations made by others	X	X			
240E003	Equip work station with supplies and forms	X	X	X		
240E004	Duplicate materials on photocopying machine	X	X		X	
240E005	Collate and bind documents	X	X		X	
240E006	Resolve user problems	X	X			
240E007	Prepare worker production log	X	X	X		
240E008	Prioritize work	X	X			
240E009	Prepare documents and batch tickets for data entry		X	X		
240E010	Maintain payroll processing procedures manual					
240E016	Process incoming telephone calls	X	X	X	X	
240E017	Process outgoing telephone calls	X	X	X	X	
240E018	Record outgoing long distance telephone calls	X	X	X		
240E019	Process incoming mail	X	X	X		
240E020	Process outgoing mail	X	X	X		
240E021	Maintain mailing list electronically	X	X	X		
240E022	Perform data protection procedures during power failure	X	X	X		
240E023	Perform power conservation and data protection procedures during air conditioning failure	X	X	X		
240E024	Follow procedures to maintain confidentiality of data	X	X	X		
240E025	Maintain system access security	X	X	X		

INFORMATION PROCESSING CLUSTER MATRIX

FILING MATERIALS MANUALLY

		WP	IS	TO	IPM	RM
240F001	Maintain magnetic media file	X	X			
240F002	Maintain software library	X	X			
240F003	Maintain non-electronic filing system	X	X			
240F004	Secure classified or confidential materials	X	X			

PERFORMING FINANCIAL ACTIVITIES

		WP	IS	TO	IPM	RM
240L001	Process payroll using computer		X			
240L002	Prepare financial statements using computer		X			
240L003	Process accounts payable using computer		X			
240L004	Process accounts receivable using computer		X			
240L005	Control merchandise inventory using computer		X			
240L006	Control equipment inventory using computer		X			
240L007	Control office supply and office form inventory using computer		X			
240L008	Process journal entries using computer		X			

MANAGING INFORMATION PROCESSING ACTIVITIES

		WP	IS	TO	IPM	RM
240M001	Establish procedures for use of information processing services				X	
240M002	Update information processing services				X	
240M003	Establish information/word processing production standards				X	
240M004	Update information/word processing production standards				X	
240M005	Establish system for logging work in and out				X	
240M006	Establish system for prioritizing information processing work				X	
240M007	Establish system for coding processed documents				X	
240M008	Establish system for storing magnetic media				X	
240M009	Establish system for storing software				X	
240M010	Establish information processing chargeback costs				X	
240M011	Conduct tours of information processing operations				X	
240M012	Train users to use information processing services				X	
240M013	Develop information processing operating budget				X	
240M014	Analyze operating results in relation to budget				X	
240M015	Design information processing forms				X	
240M016	Establish procedures for securing system and data				X	
240M017	Prepare statistical reports on information processing service productivity				X	
240M018	Prepare reports on chargeback costs				X	
240M019	Maintain safe, comfortable working environment				X	

MANAGING INFORMATION PROCESSING EQUIPMENT AND SUPPLIES

		WP	IS	TO	IPM	RM
240N001	Determine hardware needs				X	
240N002	Determine software needs				X	
240N003	Determine transcription equipment needs				X	
240N004	Determine information processing work station equipment needs				X	
240N005	Determine telecommunication needs for information processing service				X	

INFORMATION PROCESSING CLUSTER MATRIX

		WP	IS	TO	IPM	RM
240N006	Determine supplies needed for information processing service				X	
240N007	Prepare cost justification for purchase of hardware, software and other equipment				X	
240N008	Prepare cost justification for lease of hardware and other equipment				X	
240N009	Plan physical layout of information processing facility or work station				X	
240N010	Purchase software for specific business application				X	
240N011	Purchase hardware and other equipment for information processing				X	
240N012	Order information processing supplies				X	
240N013	Supervise installation of hardware and other information processing equipment				X	
240N014	Supervise installation of software				X	
240N015	Update software				X	
240N016	Monitor hardware and software for working condition				X	
240N017	Facilitate maintenance and repair of hardware and other equipment				X	
240N018	Maintain inventory records for hardware, software and other equipment				X	
240N019	Maintain equipment maintenance and repair records				X	

MANAGING INFORMATION PROCESSING EMPLOYEES

		WP	IS	TO	IPM	RM
240O001	Determine personnel needs				X	
240O002	Prepare detailed job description for each position				X	
240O003	Apply hiring policies and procedures				X	
240O004	Recruit employees				X	
240O005	Select job applicants for interviews				X	
240O006	Conduct job interviews				X	
240O007	Select employees				X	
240O008	Conduct employee orientation				X	
240O009	Develop employee training programs				X	
240O010	Monitor employees' performance				X	
240O011	Counsel employees				X	
240O012	Evaluate employees' performance				X	
240O013	Discipline employees				X	
240O014	Discharge employees				X	
240O015	Maintain personnel records				X	
240O016	Assign work to employees				X	
240O017	Conduct staff meetings				X	
240O018	Schedule vacations				X	
240O019	Maintain file of job openings				X	
240O020	Assist employees to resolve user problems				X	

PREPARING COMMUNICATIONS

		WP	IS	TO	IPM	RM
240P001	Compile information for reports or correspondence				X	
240P002	Compose correspondence				X	
240P003	Prepare oral presentations				X	
240P004	Prepare information processing procedures manual				X	
240P005	Update information processing procedures manual				X	
240P006	Dictate documents				X	
240P007	Prepare visual aids for reports and presentations				X	

INFORMATION PROCESSING CLUSTER MATRIX

INVENTORYING RECORDS

		WP	IS	TO	IPM	RM
240Q001	Develop inventory plan					X
240Q002	Determine inventory criteria					X
240Q003	Perform inventory					X
240Q004	Prepare summary of findings					X

DEVELOPING RETENTION SCHEDULES

		WP	IS	TO	IPM	RM
240R001	Determine current retention practices					X
240R002	Review inventory					X
240R003	Organize inventory into record series					X
240R004	Analyze record types					X
240R005	Identify vital records					X
240R006	Research governmental and operational requirements					X
240R007	Determine retention periods					X
240R008	Publish retention schedules					X
240R009	Coordinate record disposition					X

DEVELOPING FILING/RETRIEVAL SYSTEMS

		WP	IS	TO	IPM	RM
240S001	Analyze use of records					X
240S002	Determine manual versus automated applications					X
240S003	Establish classification and indexing criteria					X
240S004	Design filing/retrieval systems					X
240S005	Prepare cost analysis					X
240S006	Develop proposal for file conversion					X
240S007	Coordinate file conversion					X

ASSESSING EQUIPMENT AND SPACE

		WP	IS	TO	IPM	RM
240T001	Review current layout					X
240T002	Inventory equipment					X
240T003	Evaluate user needs					X
240T004	Evaluate new equipment for purchase					X
240T005	Design layouts					X
240T006	Prepare cost justification					X
240T007	Coordinate installation					X

EVALUATING EMERGING TECHNOLOGIES

		WP	IS	TO	IPM	RM
240U001	Develop library of resources					X
240U002	Attend trade shows and seminars					X
240U003	Interview vendors					X
240U004	Visit user sites					X

PROVIDING LITIGATION/TAX SUPPORT

		WP	IS	TO	IPM	RM
240V001	Conduct document search					X
240V002	Retrieve requested documents					X
240V003	Index documents					X
240V004	Prepare records policies and procedures for deposition					X
240V005	Coordinate preparation of documents					X
240V006	Implement records disposition					X
240V007	Review hold status annually					X

INFORMATION PROCESSING CLUSTER MATRIX

COMMUNICATING

		WP	IS	TO	IPM	RM
240W001	Provide accountability reports					X
240W002	Develop manuals					X
240W003	Provide training					X
240W004	Present workshops					X
240W005	Develop proposals					X
240W006	Develop professional contacts/networks					X
240W007	Participate in professional associations					X

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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

SECRETARIAL CLUSTER

Stenographer
Secretary
Legal Secretary
Medical Secretary
Executive Secretary
First Line Supervisor and Manager/Supervisor –
Clerical and Administrative Support Occupations
*Employability Skills

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SECRETARIAL CLUSTER MATRIX

ST = Stenographer
SC = Secretary
LS = Legal Secretary
MS = Medical Secretary
ES = Executive Secretary
MSC = First Line Supervisor and Manager/Supervisors - Clerical and Administrative Support Occupations

TYPEWRITING

		ST	SC	LS	MS	ES	MSC
280A001	Type from longhand or edited rough draft copy	X	X	X	X		
280A002	Type letters	X	X	X	X		
280A003	Type memos	X	X	X	X		
280A004	Type tables	X	X	X	X		
280A005	Type manuscripts	X	X	X	X		
280A006	Type technical reports	X	X	X	X		
280A007	Type special pages for manuscripts or reports, such as cover page, table of contents or bibliography	X	X	X	X		
280A008	Type outlines	X	X	X	X		
280A009	Type information on cards, such as postal cards, index cards, file cards or address-finder cards	X	X	X	X		
280A010	Type labels, such as address labels, file folder labels or file drawer labels	X	X	X	X		
280A011	Type birth record				X		
280A012	Type death record				X		
280A013	Type offset masters	X	X				
280A014	Type statistical reports	X	X				
280A015	Type graphs	X	X				
280A016	Type legal documents	X		X			
280A017	Type income tax returns			X			
280A018	Type letters from longhand or edited rough draft					X	
280A019	Type letters from machine transcription					X	
280A020	Type letters from dictation					X	
280A021	Type memos from longhand or edited rough draft					X	
280A022	Type memos from machine transcription					X	
280A023	Type memos from dictation					X	
280A024	Type tables from longhand or edited rough draft					X	
280A025	Type tables from machine transcription					X	
280A026	Type tables from dictation					X	
280A027	Type manuscripts from longhand or edited rough draft					X	
280A028	Type manuscripts from machine transcription					X	
280A029	Type manuscripts from dictation					X	
280A030	Type technical reports from longhand or edited rough draft					X	
280A031	Type technical reports from machine transcription					X	
280A032	Type technical reports from dictation					X	
280A033	Type special pages for manuscripts or reports, such as cover page, table of contents or bibliography from longhand or edited rough draft					X	
280A034	Type special pages for manuscripts or reports, such as cover page, table of contents or bibliography from machine transcription					X	
280A035	Type special pages for manuscripts or reports, such as cover page, table of contents or bibliography from dictation					X	
280A036	Type outlines from longhand or edited rough draft					X	
280A037	Type outlines from machine transcription					X	

SECRETARIAL CLUSTER MATRIX

		ST	SC	LS	MS	ES	MSC
280A038	Type outlines from dictation					X	
280A039	Type information on cards, such as postal cards, index cards, file cards or address-finder cards, from longhand or edited rough draft					X	
280A040	Type information on cards, such as postal cards, index cards, file cards or address-finder cards, from dictation					X	
280A041	Type labels, such as address labels, file folder labels or file drawer labels, from longhand or edited rough draft					X	
280A042	Type labels, such as address labels, file folder labels or file drawer labels, from dictation					X	
280A043	Type offset masters from longhand or edited rough draft					X	
280A044	Type statistical reports from longhand or edited rough draft					X	
280A045	Type graphs from longhand or edited rough draft					X	

PROCESSING MAIL

		ST	SC	LS	MS	ES	MSC
280B001	Process incoming mail	X	X	X	X	X	X
280B002	Maintain mail distribution list	X	X	X	X	X	
280B003	Forward mail	X	X	X	X	X	
280B004	Process outgoing mail	X	X	X	X	X	X
280B005	Prepare packages for shipping	X	X	X	X	X	
280B006	Prepare specialized mail, such as registered, certified or insured mail	X	X	X	X	X	
280B007	Maintain mailing list manually	X	X	X	X	X	
280B008	Maintain mailing list on computer or word processor	X	X	X	X		
280B009	Process bulk mailing	X	X	X	X	X	
280B010	Maintain mailing list electronically					X	X

COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

		ST	SC	LS	MS	ES	MSC
280C001	Make notes on employer's mail	X	X	X	X	X	
280C002	Make travel arrangements	X	X	X	X	X	
280C003	Prepare travel expense vouchers	X	X	X	X	X	
280C004	Schedule appointments or meetings	X	X	X	X	X	
280C005	Maintain appointment book	X	X	X	X	X	
280C006	Prepare daily schedule of appointments	X	X	X	X	X	
280C007	Cancel and reschedule appointments or meetings	X	X	X	X	X	
280C008	Make arrangements for meetings	X	X	X	X	X	
280C009	Prepare and distribute minutes of meeting	X	X	X	X	X	
280C010	Arrange conferences		X	X	X	X	
280C011	Maintain appointments and meeting schedules on computer	X	X	X	X	X	
280C012	Schedule hospital admission, ancillary testing, outpatient surgery or referral to colleagues for patients				X		
280C013	Review technical journals for articles of interest		X	X	X	X	
280C014	Notarize documents		X	X	X	X	
280C015	Schedule court hearings			X			
280C016	Arrange itineraries					X	
280C017	Obtain passport for employer					X	
280C018	Prepare meeting agenda					X	
280C019	Arrange receptions, dinners or banquets					X	

SECRETARIAL CLUSTER MATRIX

RECEIVING VISITORS, PATIENTS OR CLIENTS

		ST	SC	LS	MS	ES	MSC
280D001	Receive visitors or clients	X	X	X		X	
280D002	Receive visitors, patients or clients				X		
280D003	Introduce visitors or clients	X	X	X		X	
280D004	Explain schedule changes to waiting visitors or clients	X	X	X		X	
280D005	Register new patients				X		
280D006	Maintain log of visitors or clients	X	X	X		X	
280D007	Introduce visitors, patients or clients				X		
280D008	Explain schedule changes to waiting visitors, patients or clients				X		
280D009	Maintain a log of visitors, patients or clients				X		
280D010	Organize guided tours of business					X	

PERFORMING TELECOMMUNICATIONS ACTIVITIES

		ST	SC	LS	MS	ES	MSC
280E001	Process incoming telephone calls	X	X	X	X	X	X
280E002	Process outgoing telephone calls	X	X	X	X	X	X
280E003	Maintain lists of telephone numbers, such as numbers frequently called, emergency numbers or employee extension numbers	X	X	X	X	X	X
280E004	Record outgoing long distance telephone calls	X	X	X	X	X	X
280E005	Maintain telephone listings on computer or word processor	X	X	X	X	X	X
280E006	Determine telecommunication needs for office					X	X
280E007	Prepare cost justification for purchase or lease of telecommunications equipment or service					X	X
280E008	Order telecommunications equipment or service					X	X
280E009	Supervise changes in telecommunications equipment and service					X	X

MAINTAINING OFFICE SUPPLIES AND FORMS

		ST	SC	LS	MS	ES	MSC
280F001	Equip desk with office supplies and office forms	X	X	X	X		
280F002	Order supplies and forms for office		X	X	X	X	X
280F003	Receive office supplies and forms		X	X	X	X	X
280F004	Store office supplies and forms		X	X	X	X	X
280F005	Issue office supplies and forms		X	X	X	X	X
280F006	Receive medical supplies and medications				X		
280F007	Store medical supplies and medications				X		
280F008	Prepare office supply and office form inventory records manually	X	X	X	X	X	X
280F009	Process office supply and office form inventory reports on computer or word processor	X	X	X	X	X	X
280F010	Prepare cost justification for purchase of office supplies and office forms					X	X
280F011	Equip work station with supplies and forms					X	X

MAINTAINING OFFICE EQUIPMENT

		ST	SC	LS	MS	ES	MSC
280G001	Change office equipment ribbons	X	X	X	X	X	
280G002	Clean office equipment		X	X	X	X	
280G003	Perform maintenance functions on photocopier, such as changing toner and replacing paper	X	X	X	X	X	X
280G004	Repair minor office equipment malfunctions	X	X	X	X	X	
280G005	Recommend service on office equipment	X	X	X	X	X	
280G006	Place service calls for office equipment	X	X	X	X	X	X

SECRETARIAL CLUSTER MATRIX

		ST	SC	LS	MS	ES	MSC
280G007	Schedule office equipment for routine maintenance		X	X	X	X	X
280G008	Order office equipment		X	X	X	X	X
280G009	Receive office equipment		X	X	X	X	X
280G010	Recommend purchase or lease of office equipment		X	X	X	X	X
280G011	Inventory office equipment		X	X	X	X	X
280G012	Process office equipment repair records manually		X	X	X	X	X
280G013	Supervise installation of office equipment					X	X
280G014	Prepare cost justification for purchase or lease of office equipment					X	X
280G015	Process office equipment inventory records manually					X	X
280G016	Process office equipment inventory records on computer or word processor					X	X
280G017	Process office equipment repair records on computer or word processor					X	X
280G018	Determine software needs						X
280G019	Determine office equipment needs						X
280G020	Determine work station furniture needs						X
280G021	Prepare cost justification for purchase of software						X
280G022	Purchase software for specific business application						X
280G023	Supervise installation of software						X
280G024	Update software						X
280G025	Monitor hardware and software for working condition						X
280G026	Maintain inventory records for software						X
280G027	Requisition office equipment						X

ORGANIZING AND PLANNING

		ST	SC	LS	MS	ES	MSC
280H001	Plan office layout and workflow		X	X	X	X	X
280H002	Prioritize work	X	X	X	X	X	X
280H003	Maintain the reception room		X	X	X		
280H004	Schedule custodial and maintenance services		X	X	X	X	
280H005	Maintain professional reference library	X	X	X	X	X	
280H006	Expedite charitable and civic contributions		X	X	X	X	
280H007	Establish system to prioritize work					X	X
280H008	Establish procedures for use of clerical/administrative services						X
280H009	Update clerical/administrative services activities						X
280H010	Establish clerical/administrative services production standards						X
280H011	Update clerical/administrative services production standards						X
280H012	Establish system for logging work in and out						X
280H013	Establish clerical/administrative services chargeback costs						X
280H014	Conduct tours of clerical/administrative services area						X
280H015	Train users of clerical/administrative services						X
280H016	Develop clerical/administrative services operating budget						X
280H017	Analyze operating results in relation to budget						X
280H018	Design clerical/administrative services forms						X
280H019	Establish procedures for securing confidential information						X
280H020	Prepare statistical reports on clerical/administrative services productivity						X
280H021	Prepare reports on chargeback costs						X
280H022	Maintain safe, comfortable working environment						X

SECRETARIAL CLUSTER MATRIX

PERFORMING CLERICAL ACTIVITIES

		ST	SC	LS	MS	ES	MSC
280I001	Duplicate materials on photocopying machine	X	X	X	X	X	X
280I002	Collate and bind documents	X	X	X	X	X	X
280I003	Verify calculations made by others	X	X	X	X	X	
280I004	Put up bulletin board display	X	X	X	X	X	X
280I005	Clean and straighten up work area	X	X	X	X	X	X
280I006	Label exhibits presented in court			X			

FILING MATERIALS MANUALLY

		ST	SC	LS	MS	ES	MSC
280J001	Establish manual filing system	X	X	X	X	X	X
280J002	Establish cross-referencing system	X	X	X	X	X	X
280J003	Establish file index system	X	X	X	X	X	X
280J004	Establish file checkout system	X	X	X	X	X	X
280J005	File materials using alphabetic filing system	X	X	X	X	X	
280J006	File materials using numeric filing system	X	X	X	X	X	
280J007	File materials using subject filing system	X	X	X	X	X	
280J008	Retrieve materials from files	X	X	X	X	X	
280J009	Retrieve materials stored on microfilm or microfiche	X	X	X	X	X	
280J010	Secure classified or confidential files	X	X	X	X		
280J011	Locate misfiles	X	X	X	X	X	
280J012	Establish record retention policies		X	X	X	X	X
280J013	Transfer materials to inactive files	X	X	X	X	X	
280J014	Purge files	X	X	X	X	X	
280J015	Update cross-referencing system and file index system	X	X	X	X	X	X
280J016	Revise file checkout system	X	X	X	X	X	X
280J017	Update filing system and files	X	X	X	X	X	X
280J018	Arrange for filing of special materials		X	X	X	X	X
280J019	Sort materials for alphabetic filing	X	X	X	X	X	
280J020	Sort materials for numeric filing	X	X	X	X	X	
280J021	Sort materials for subject filing	X	X	X	X	X	
280J022	Code materials for filing	X	X	X	X	X	
280J023	Secure classified or confidential materials					X	
280J024	Establish system for securing classified or confidential materials					X	X
280J025	Establish system for filing magnetic media					X	X
280J026	Establish system for storing backup copies of diskettes					X	X
280J027	Establish system for storing software					X	X

TAKING AND TRANSCRIBING DICTATION

		ST	SC	LS	MS	ES	MSC
280K001	Take dictation using shorthand	X	X	X	X	X	
280K002	Transcribe shorthand dictation	X	X	X	X	X	
280K003	Transcribe dictation from recorded media	X	X	X	X	X	
280K004	Take medical dictation and transcribe medical documents				X		
280K005	Take legal dictation and transcribe legal documents			X			
280K006	Take dictation using brief hand					X	
280K007	Transcribe brief hand dictation					X	
280K008	Take dictation at typewriter					X	

SUPERVISING AND TRAINING

		ST	SC	LS	MS	ES	MSC
280L001	Maintain personnel records		X	X	X		
280L002	Orient new employees		X	X	X	X	X
280L003	Assign work to others		X	X	X	X	X

SECRETARIAL CLUSTER MATRIX

		ST	SC	LS	MS	ES	MSC
280L004	Evaluate work methods and procedures		X	X	X	X	X
280L005	Interview applicants for employment		X			X	X
280L006	Prepare employee evaluation reports		X			X	X
280L007	Determine personnel needs					X	X
280L008	Prepare detailed job description for each position					X	X
280L009	Apply hiring policies and procedures					X	X
280L010	Recruit employees					X	X
280L011	Select job applicants for interviews					X	X
280L012	Recommend applicants for hiring					X	
280L013	Maintain personnel records manually					X	X
280L014	Maintain personnel records on computer or word processor					X	X
280L015	Monitor employees' performance					X	X
280L016	Counsel employees					X	X
280L017	Resolve employee problems					X	X
280L018	Develop employee training programs					X	X
280L019	Conduct staff meetings					X	X
280L020	Schedule vacations					X	X
280L021	Maintain file of job openings						X
280L022	Discipline employees						X
280L023	Discharge employees						X
280L024	Assist employees to resolve user problems						X
280L025	Interpret company personnel policies and procedures						X
280L026	Demonstrate equipment use						X

PREPARING WRITTEN COMMUNICATIONS

		ST	SC	LS	MS	ES	MSC
280M001	Compile information for reports or correspondence	X	X	X	X	X	X
280M002	Compose correspondence	X	X	X	X	X	X
280M003	Compose reports	X	X	X	X	X	X
280M004	Edit documents	X	X	X	X	X	X
280M005	Prepare office manuals		X	X	X	X	
280M006	Prepare and send cablegrams, telegrams and mailgrams	X	X	X	X	X	X
280M007	Prepare newspaper ads		X				
280M008	Prepare news releases		X			X	
280M009	Prepare graphic materials manually	X	X			X	
280M010	Prepare advertisements and promotional material					X	
280M011	Dictate documents					X	X
280M012	Paste up materials to be printed					X	
280M013	Abstract materials, such as articles, books or reports					X	X
280M014	Compile statistical data					X	X
280M015	Compose speeches					X	X
280M016	Prepare and make oral presentations					X	X
280M017	Design forms					X	
280M018	Prepare visual aids					X	X
280M019	Prepare requests for quotations or proposals					X	
280M020	Prepare clerical/administrative services staff procedures manual						X
280M021	Update clerical/administrative services staff procedures manual						X
280M022	Develop clerical/administrative services users manual						X
280M023	Update clerical/administrative services users manual						X

SECRETARIAL CLUSTER MATRIX

PERFORMING FINANCIAL ACTIVITIES

		ST	SC	LS	MS	ES	MSC
280N001	Process charge slips		X	X	X		
280N002	Prepare itemized bills, invoices or statements manually		X	X	X		
280N003	Process payments manually		X	X	X		
280N004	Reconcile cash count with payments		X	X	X		
280N005	Prepare bank deposits		X	X	X		
280N006	Process overdue accounts		X	X	X		
280N007	Process accounts payable invoices manually		X	X	X		
280N008	Make journal entries manually		X	X	X		
280N009	Control petty cash fund		X	X	X	X	X
280N010	Prepare payroll using calculator		X	X	X		
280N011	Prepare financial statements using calculator		X	X	X	X	
280N012	Process vouchers for payment manually		X	X	X		
280N013	Post entries from journals to ledgers manually			X	X		
280N014	Reconcile bank statements		X	X	X		
280N015	Prepare quarterly tax reports		X	X		X	
280N016	Prepare payment vouchers on computer		X	X			
280N017	Process accounts receivable on computer		X	X			
280N018	Maintain fee schedule manually			X			
280N019	Maintain fee schedule on computer or word processor			X			
280N020	Prepare financial statements using computer					X	
280N021	Process requisitions prepared by others					X	
280N022	Approve bills for payment					X	X
280N023	Draft budget estimates					X	
280N024	Manage cash advance account						X

INPUTTING AND STORING DOCUMENTS AND FILES

		ST	SC	LS	MS	ES	MSC
2800001	Key documents from longhand or edited rough draft	X	X	X	X		
2800002	Key documents from machine transcription	X	X	X	X		
2800003	Key mailing labels and envelopes	X	X	X	X	X	
2800004	Input documents using optical character recognition equipment	X	X	X	X		
2800005	Input data into spreadsheet formats	X	X	X	X	X	
2800006	Store repetitive material	X	X	X	X	X	
2800007	Input data from source documents	X	X	X	X	X	
2800008	Initialize diskettes	X	X	X	X	X	
2800009	Input data into graphs and charts	X	X	X			
2800010	Input records into data base files	X	X	X	X		
2800011	Prepare backup files	X	X	X	X		
2800012	Create glossary file	X	X	X	X	X	
2800013	Update spelling dictionary	X	X	X	X	X	
2800014	Store documents on diskettes	X	X	X	X		
2800015	Key correspondence from longhand or edited rough draft					X	
2800016	Key correspondence from machine transcription					X	
2800017	Key business reports or manuscripts from longhand or edited rough draft					X	
2800018	Key business reports or manuscripts from machine transcription					X	
2800019	Key meeting minutes from longhand or edited rough draft					X	
2800020	Key meeting minutes from machine transcription					X	
2800021	Key outlines from longhand or edited rough draft					X	
2800022	Key outlines from machine transcription					X	
2800023	Key agenda from longhand or edited rough draft					X	
2800024	Key agenda from machine transcription					X	

		ST	SC	LS	MS	ES	MSC
2800025	Key news release from longhand or edited rough draft					X	
2800026	Key news release from machine transcription					X	
2800027	Input data using optical character recognition equipment					X	
2800028	Revise spreadsheet formulas					X	
2800029	Input data to prepare graphs and charts					X	
2800030	Input data into data base files					X	
2800031	Create backup files					X	
2800032	Key tabular information					X	

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

		ST	SC	LS	MS	ES	MSC
280P001	Proofread document for content, format and typographical errors	X	X	X	X	X	
280P002	Move (rearrange) text	X	X	X	X	X	
280P003	Search and replace text	X	X	X	X	X	
280P004	Insert text	X	X	X	X		
280P005	Rename files	X	X	X	X	X	
280P006	Insert end-of-line hyphens into text	X	X	X	X	X	
280P007	Prepare new document from existing documents	X	X	X	X	X	
280P008	Add new record to files	X	X	X	X		
280P009	Update existing records in files	X	X	X	X		
280P010	Update data on spreadsheets	X	X	X	X	X	
280P011	Revise stored repetitive material	X	X	X	X	X	
280P012	Verify data and correct errors	X	X	X	X		
280P013	Delete text, files or records from storage	X	X	X	X		
280P014	Assemble documents from stored text	X	X	X	X	X	
280P015	Maintain backup files	X	X	X	X		
280P016	Process text and data using integrated software	X	X	X	X	X	
280P017	Copy one diskette to another	X	X	X	X	X	
280P018	Insert and delete text					X	
280P019	Update existing records in data base files					X	
280P020	Delete text or data from storage					X	
280P021	Add data to the backup files	X	X	X	X	X	
280P022	Delete data from backup files	X	X	X	X	X	
280P023	Update data on graphs and charts					X	

PRINTING, DISTRIBUTING AND RECEIVING OUTPUT

		ST	SC	LS	MS	ES	MSC
280Q001	Print documents or reports using continuous-feed (fanfold or pinfeed) paper	X	X	X	X	X	
280Q002	Print documents or reports using single-sheet paper	X	X	X	X	X	
280Q003	Print information according to sort criteria	X	X	X	X	X	
280Q004	Receive documents or reports via modem	X	X	X	X		
280Q005	Transmit communications using electronic bulletin board or electronic mail	X	X	X	X	X	
280Q006	Print mailing labels or envelopes	X	X	X	X	X	
280Q007	Monitor electronic bulletin board or electronic mail	X	X			X	
280Q008	Transmit documents or reports via modem	X	X	X	X		
280Q009	Transmit data via modem					X	
280Q010	Receive data via modem					X	
280Q011	Separate continuous-feed forms or paper					X	
280Q012	Sort completed jobs for distribution					X	

SECRETARIAL CLUSTER MATRIX

PREPARING MEDICAL RECORDS AND INSURANCE FORMS

		ST	SC	LS	MS	ES	MSC
280R001	Assist patient to complete registration form(s)				X		
280R002	Type medical information, such as history, notes, clinical resumes and reports into medical records				X		
280R003	Process out-of-office examination or treatment information				X		
280R004	Code diagnoses and surgical procedures				X		
280R005	Transcribe codings from clinical records				X		
280R006	Review medical records for completeness and accuracy				X		
280R007	Complete commercial insurance claim forms				X		
280R008	Complete Medicare payment request forms				X		
280R009	Complete Medicaid claim forms				X		
280R010	Complete worker's compensation claim forms				X		
280R011	Complete disability claim forms				X		

PREPARING COURT DOCUMENTS

		ST	SC	LS	MS	ES	MSC
280S001	Prepare adoption papers			X			
280S002	Prepare affidavits			X			
280S003	Prepare affidavits for motions and notices			X			
280S004	Prepare answers			X			
280S005	Prepare papers for bankruptcy			X			
280S006	Prepare briefs			X			
280S007	Prepare complaints on preprinted forms			X			
280S008	Prepare complaints from sample forms			X			
280S009	Prepare complaints from dictation			X			
280S010	Prepare answers and counterclaims			X			
280S011	Prepare answers and cross-claims			X			
280S012	Take depositions			X			
280S013	Prepare restraining orders (injunctions)			X			
280S014	Prepare judgments			X			
280S015	Prepare motions			X			
280S016	Prepare motions and notices			X			
280S017	Prepare public notices			X			
280S018	Prepare orders			X			
280S019	Prepare petitions from dictation			X			
280S020	Prepare petitions from sample forms			X			
280S021	Prepare subpoenas			X			
280S022	Prepare summons			X			
280S023	Prepare petitions and certificates for dissolution of marriage			X			
280S024	Prepare findings of facts and decrees for dissolution of marriage			X			
280S025	Prepare papers for probate court			X			
280S026	Prepare final settlements of estates			X			
280S027	Prepare papers for child support			X			

PREPARING CLIENT DOCUMENTS

		ST	SC	LS	MS	ES	MSC
280T001	Prepare agreements			X			
280T002	Prepare bills of sale			X			
280T003	Prepare codicils			X			
280T004	Prepare contracts from dictation			X			
280T005	Prepare contracts on preprinted forms			X			
280T006	Prepare deeds from dictation			X			
280T007	Prepare deeds on preprinted forms			X			

SECRETARIAL CLUSTER MATRIX

		ST	SC	LS	MS	ES	MSC
280T008	Prepare leases from dictation			X			
280T009	Prepare leases on preprinted forms			X			
280T010	Prepare mortgages from dictation			X			
280T011	Prepare mortgages on preprinted forms			X			
280T012	Prepare chattel mortgages on preprinted forms			X			
280T013	Prepare promissory notes from dictation			X			
280T014	Prepare promissory notes on preprinted forms			X			
280T015	Prepare powers of attorney from dictation			X			
280T016	Prepare powers of attorney on preprinted forms			X			
280T017	Prepare wills			X			
280T018	Prepare articles of incorporation			X			
280T019	Prepare corporation minute books			X			

Education
For
Employment
Task Lists

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

GENERAL OFFICE CLERK CLUSTER

Receptionist
Typist
Insurance Policy Processing Clerk/
  Insurance Claims Clerk
First Line Supervisor and Manager/Supervisors –
  Clerical and Administrative Support Occupations
Traffic, Shipping and Receiving Clerks
File Clerks
Records Management Analyst
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these matrices form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

These materials were prepared under contract with the Illinois State Board of Education, Department of Adult, Vocational and Technical Education ("Illinois Competency Based Vocational Education Project," contract number PS-10-130).

GENERAL OFFICE CLERK CLUSTER MATRIX

R = Receptionist
T = Typist
ICC = Insurance Policy Processing Clerk/Insurance Claims Clerk
SC = First Line Supervisor and Manager/Supervisors - Clerical and Administrative Support Occupations
SRC = Traffic, Shipping and Receiving Clerks
FCL = File Clerks
RM = Records Management Analyst

TYPEWRITING

		R	T	ICC	MSC	SRC	FCL	RM
300A001	Type forms	X	X					
300A002	Type offset masters		X					
300A003	Maintain all hard copy files and records		X					
300A004	Type from longhand or edited rough draft copy	X	X					
300A005	Type letters	X	X					
300A006	Type memos	X	X					
300A007	Type tables	X	X					
300A008	Type manuscripts	X	X					
300A009	Type technical reports	X	X					
300A010	Type special pages for manuscripts or reports, such as cover page, table of contents or bibliography	X	X					
300A011	Type outlines	X	X					
300A012	Type information on cards, such as postal cards, index cards, file cards or address-finder cards	X	X					
300A013	Type labels, such as address labels, file folder labels or file drawer labels	X	X					
300A014	Transcribe dictation from recorded media	X	X					

PERFORMING TELECOMMUNICATIONS ACTIVITIES

		R	T	ICC	MSC	SRC	FCL	RM
300B001	Process incoming telephone calls	X	X		X		X	
300B002	Process incoming switchboard calls	X						
300B003	Process outgoing telephone calls	X	X		X		X	
300B004	Process outgoing switchboard calls	X						
300B005	Record outgoing long distance telephone calls	X	X		X			
300B006	Record outgoing long distance switchboard calls	X						
300B007	Maintain lists of telephone numbers, such as numbers frequently called, emergency numbers or employee extension numbers	X	X		X			
300B008	Maintain telephone listings on computer or word processor	X	X		X			
300B009	Take messages, and get them to the correct employee	X	X					
300B010	Determine telecommunication needs for office				X			
300B011	Prepare cost justification for purchase or lease of telecommunications equipment or service				X			
300B012	Order telecommunications equipment or service				X			
300B013	Supervise changes in telecommunications equipment and service				X			

MAINTAINING OFFICE EQUIPMENT

		R	T	ICC	MSC	SRC	FCL	RM
300C001	Change office equipment ribbons	X	X					
300C002	Clean office equipment	X	X					
300C003	Perform maintenance functions on photocopier, such as changing toner and replacing paper	X	X		X		X	

GENERAL OFFICE CLERK CLUSTER MATRIX

		R	T	ICC	MSC	SRC	FCL	RM
300C004	Repair minor office equipment malfunctions	X	X					
300C005	Recommend service on office equipment	X	X					
300C006	Place service calls for office equipment				X			
300C007	Schedule office equipment for routine maintenance				X			
300C008	Prepare cost justification for purchase or lease of office equipment				X			
300C009	Recommend purchase or lease of office equipment				X			
300C010	Order office equipment				X			
300C011	Receive office equipment				X			
300C012	Inventory office equipment				X			
300C013	Process office equipment inventory records manually				X			
300C014	Process office equipment inventory records on computer or word processor				X			
300C015	Supervise installation of office equipment				X			
300C016	Process office equipment repair records manually				X			
300C017	Process office equipment repair records on computer or word processor				X			
300C018	Determine software needs				X			
300C019	Determine office equipment needs				X			
300C020	Determine work station furniture needs				X			
300C021	Prepare cost justification for purchase of software				X			
300C022	Purchase software for specific business application				X			
300C023	Supervise installation of software				X			
300C024	Update software				X			
300C025	Monitor hardware and software for working condition				X			
300C026	Maintain inventory records for software				X			
300C027	Requisition office equipment				X			
300C028	Report equipment malfunctions to supervisor						X	
300C029	Repair minor equipment malfunctions						X	

PERFORMING CLERICAL ACTIVITIES

		R	T	ICC	MSC	SRC	FCL	RM
300D001	Duplicate materials on photocopying machine	X	X		X		X	
300D002	Collate and bind documents	X	X		X		X	
300D003	Put up bulletin board display	X	X		X			
300D004	Clean and straighten up work area	X	X		X		X	
300D005	Verify calculations made by others	X	X					
300D006	Equip desk with office supplies and office forms	X	X					
300D007	Equip work station with supplies and forms						X	

FILING MATERIALS MANUALLY

		R	T	ICC	MSC	SRC	FCL	RM
300E001	Code materials for filing	X	X				X	
300E002	Sort materials for alphabetic filing	X	X				X	
300E003	Sort materials for numeric filing	X	X				X	
300E004	Sort materials for subject filing	X	X				X	
300E005	File materials using alphabetic filing system	X	X				X	
300E006	File materials using numeric filing system	X	X				X	
300E007	File materials using subject filing system	X	X				X	
300E008	Retrieve materials from files	X	X				X	
300E009	Retrieve materials stored on microfilm or microfiche	X	X				X	
300E010	Locate misfiles	X	X				X	
300E011	Transfer materials to inactive files	X	X				X	
300E012	Purge files	X	X				X	
300E013	Establish manual filing system				X			

GENERAL OFFICE CLERK CLUSTER MATRIX

		R	T	ICC	MSC	SRC	FCL	RM
300E014	Establish cross-referencing system				X			
300E015	Establish file index system				X			
300E016	Establish file checkout system				X			
300E017	Establish record retention policies				X			
300E018	Update cross-referencing system and file index system				X			
300E019	Revise file checkout system				X			
300E020	Update filing system and files				X			
300E021	Arrange for filing of special materials				X			
300E022	Establish system for filing magnetic media				X			
300E023	Establish system for storing backup copies of diskettes				X			
300E024	Establish system for storing software				X			
300E025	Establish system for securing classified or confidential materials				X			
300E026	Sort materials for geographic filing						X	
300E027	Sort materials for color-coded filing system						X	
300E028	File materials using geographic filing system						X	
300E029	File materials using color-coded filing system						X	
300E030	Follow established filming procedures for microfilm or microfiche						X	
300E031	File microfilm or microfiche						X	
300E032	Apply established records retention policies						X	
300E033	Complete cross-reference sheet						X	
300E034	Process outguides						X	
300E035	Secure classified or confidential materials						X	

ORGANIZING AND PLANNING

		R	T	ICC	MSC	SRC	FCL	RM
300F001	Expedite charitable and civic contributions	X						
300F002	Prioritize work	X	X		X			
300F003	Plan office layout and workflow				X			
300F004	Establish system to prioritize work				X			
300F005	Establish procedures for use of clerical/administrative services				X			
300F006	Update clerical/administrative services activities				X			
300F007	Establish clerical/administrative services production standards				X			
300F008	Update clerical/administrative services production standards				X			
300F009	Establish system for logging work in and out				X			
300F010	Establish clerical/administrative services chargeback costs				X			
300F011	Conduct tours of clerical/administrative services area				X			
300F012	Train users of clerical/administrative services				X			
300F013	Develop clerical/administrative services operating budget				X			
300F014	Analyze operating results in relation to budget				X			
300F015	Design clerical/administrative services forms				X			
300F016	Establish procedures for securing confidential information				X			
300F017	Prepare statistical reports on clerical/administrative services productivity				X			
300F018	Prepare reports on chargeback costs				X			
300F019	Maintain safe, comfortable working environment				X			

GENERAL OFFICE CLERK CLUSTER MATRIX

INPUTTING AND STORING DOCUMENTS AND FILES

		R	T	ICC	MSC	SRC	FCL	RM
300G001	Initialize diskettes	X	X					
300G002	Key documents from longhand or edited rough draft	X	X					
300G003	Key documents from machine transcription	X	X					
300G004	Prepare backup files	X	X					
300G005	Store documents on diskettes	X	X					
300G006	Key mailing labels and envelopes		X					
300G007	Input data into spreadsheet formats		X					
300G008	Input data into graphs and charts		X					
300G009	Input records into data base files		X					
300G010	Create glossary file		X					
300G011	Store repetitive material		X					
300G012	Update spelling dictionary		X					

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

		R	T	ICC	MSC	SRC	FCL	RM
300H001	Process text and data using integrated software	X	X					
300H002	Proofread document for format, content and typographical errors	X	X					
300H003	Move (rearrange) text	X	X					
300H004	Search and replace text	X	X					
300H005	Insert text	X	X					
300H006	Rename files	X	X					
300H007	Insert end-of-line hyphens into text	X	X					
300H008	Prepare new document from existing documents	X	X					
300H009	Add new records to files	X	X					
300H010	Update existing records in files	X	X					
300H011	Revise stored repetitive material	X	X					
300H012	Verify data and correct errors	X	X					
300H013	Delete text, files or records from storage	X	X					
300H014	Copy one diskette to another	X	X					
300H015	Assemble documents from stored text	X	X					
300H016	Maintain backup files	X	X					
300H017	Update data on spreadsheets		X					

PRINTING, DISTRIBUTING AND RECEIVING OUTPUT

		R	T	ICC	MSC	SRC	FCL	RM
300I001	Transmit documents or reports via modem		X					
300I002	Receive documents or reports via modem		X					
300I003	Transmit communications using electronic bulletin board or electronic mail		X					
300I004	Print documents or reports using single-sheet paper	X	X					
300I005	Print information according to sort criteria	X	X					
300I006	Print mailing labels or envelopes	X	X					
300I007	Monitor electronic bulletin board or electronic mail		X					

PROCESSING MAIL

		R	T	ICC	MSC	SRC	FCL	RM
300J001	Process incoming mail	X			X			
300J002	Maintain mail distribution list	X						
300J003	Forward mail	X						
300J004	Process outgoing mail	X			X			
300J005	Process bulk mailing	X						
300J006	Prepare packages for shipping	X						

GENERAL OFFICE CLERK CLUSTER MATRIX

		R	T	ICC	MSC	SRC	FCL	RM
300J007	Prepare specialized mail, such as registered, certified or insured mail	X						
300J008	Maintain mailing list manually	X						
300J009	Maintain mailing list on computer or word processor	X						
300J010	Receive mail			X				
300J011	Sort mail			X				
300J012	Order file			X				
300J013	Distribute mail			X				
300J014	Maintain mailing list electronically				X			

COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

		R	T	ICC	MSC	SRC	FCL	RM
300K001	Schedule appointments or meetings	X						
300K002	Maintain appointment book	X						
300K003	Prepare daily schedule of appointments	X						
300K004	Cancel and reschedule appointments or meetings	X						
300K005	Make arrangements for meetings	X						
300K006	Call telephone repair service	X						
300K007	Page employees	X						
300K008	Deal with irate phone calls	X						

RECEIVING VISITORS, PATIENTS OR CLIENTS

		R	T	ICC	MSC	SRC	FCL	RM
300L001	Receive visitors, patients or clients	X						
300L002	Introduce visitors or clients	X						
300L003	Maintain log of visitors	X						
300L004	Explain schedule changes to waiting visitors, patients or clients	X						
300L005	Give directions to location	X						

PROCESSING NEW APPLICATIONS AND RENEWALS

		R	T	ICC	MSC	SRC	FCL	RM
300M001	Complete applications or renewals			X				
300M002	Transmit to home office			X				
300M003	Determine completeness of application or renewal			X				
300M004	Route to proper department			X				
300M005	Establish policy records			X				
300M006	Determine risk within limits			X				
300M007	Calculate insurance premium			X				
300M008	Issue policy			X				
300M009	Assemble insurance policy			X				
300M010	Distribute policy and copies			X				
300M011	Verify policy at agent's office			X				
300M012	Update client file			X				
300M013	Arrange for policy delivery			X				
300M014	Respond to application/renewal inquiries			X				

PROCESSING BILLING

		R	T	ICC	MSC	SRC	FCL	RM
300N001	Establish billing records			X				
300N002	Generate bill/premium notice			X				
300N003	Review bill/premium notice for accuracy			X				
300N004	Correct/release bill/premium notice			X				
300N005	Respond to billing inquiries			X				

GENERAL OFFICE CLERK CLUSTER MATRIX

PROCESSING PREMIUM PAYMENTS

		R	T	ICC	MSC	SRC	FCL	RM
300O001	Receive premium payments			X				
300O002	Disburse premium payments			X				
300O003	Reconcile premium payments			X				
300O004	Update policy records to show premium payments			X				
300O005	Update agency records			X				
300O006	Respond to premium payment inquiries			X				
300O007	Perform conservation activities			X				

PROCESSING POLICY CHANGES

		R	T	ICC	MSC	SRC	FCL	RM
300P001	Receive change request/notification of policy change			X				
300P002	Validate request			X				
300P003	Approve request within limits			X				
300P004	Calculate premium for policy change			X				
300P005	Update policy records with policy changes			X				
300P006	Endorse or reinsure policy			X				
300P007	Distribute documents			X				
300P008	Respond to policy change inquiries			X				

PROCESSING BENEFIT PAYMENTS

		R	T	ICC	MSC	SRC	FCL	RM
300Q001	Receive request for payments			X				
300Q002	Calculate benefit payable			X				
300Q003	Attempt conservation of policy			X				
300Q004	Verify fulfillment of prerequisites			X				
300Q005	Issue payment			X				
300Q006	Verify payment			X				
300Q007	Respond to benefit payment inquiries			X				

PROCESSING CLAIMS

		R	T	ICC	MSC	SRC	FCL	RM
300R001	Receive claim form			X				
300R002	Verify insurance coverage/status			X				
300R003	Obtain proof of loss			X				
300R004	Route claim to claim's representative			X				
300R005	Adjudicate the claim			X				
300R006	Update policy records to show claims			X				
300R007	Notify claimant of disposition of claim			X				

PERFORMING CUSTOMER SERVICES

		R	T	ICC	MSC	SRC	FCL	RM
300S001	Respond to general inquiries			X				
300S002	Assist with third-party claims			X				
300S003	Reproduce documents for customers			X				
300S004	Assist customers with forms			X				

PERFORMING AGENCY SERVICES

		R	T	ICC	MSC	SRC	FCL	RM
300T001	Establish agency records			X				
300T002	Update agency production records			X				
300T003	Prepare required forms			X				
300T004	Compile reports			X				
300T005	Update mailing lists			X				
300T006	Maintain accounting records			X				

GENERAL OFFICE CLERK CLUSTER MATRIX

		R	T	ICC	MSC	SRC	FCL	RM
300T007	Perform banking functions			X				
300T008	Perform payroll functions			X				
300T009	Maintain office supplies			X				
300T010	Participate in public relations			X				
300T011	Update procedural manuals			X				

MAINTAINING OFFICE SUPPLIES AND FORMS

		R	T	ICC	MSC	SRC	FCL	RM
300U001	Equip work station with supplies and forms				X			
300U002	Prepare cost justification for purchase of office supplies and office forms				X			
300U003	Order supplies and forms for office				X			
300U004	Receive office supplies and forms				X			
300U005	Store office supplies and forms				X			
300U006	Issue office supplies and forms				X			
300U007	Prepare office supply and office form inventory records manually				X			
300U008	Process office supply and office form inventory reports on computer or word processor				X			

SUPERVISING AND TRAINING

		R	T	ICC	MSC	SRC	FCL	RM
300V001	Determine personnel needs				X			
300V002	Prepare detailed job description for each position				X			
300V003	Apply hiring policies and procedures				X			
300V004	Recruit employees				X			
300V005	Select job applicants for interviews				X			
300V006	Interview applicants for employment				X			
300V007	Recommend applicants for hiring				X			
300V008	Maintain personnel records manually				X			
300V009	Maintain personnel records on computer or word processor				X			
300V010	Orient new employees				X			
300V011	Assign work to others				X			
300V012	Monitor employees' performance				X			
300V013	Counsel employees				X			
300V014	Prepare employee evaluation reports				X			
300V015	Resolve employee problems				X			
300V016	Develop employee training programs				X			
300V017	Conduct staff meetings				X			
300V018	Schedule vacations				X			
300V019	Maintain file of job openings				X			
300V020	Evaluate work methods and procedures				X			
300V021	Discipline employees				X			
300V022	Discharge employees				X			
300V023	Assist employees to resolve user problems				X			
300V024	Interpret company personnel policies and procedures				X			
300V025	Demonstrate equipment use				X			

PREPARING WRITTEN COMMUNICATIONS

		R	T	ICC	MSC	SRC	FCL	RM
300W001	Compile information for reports or correspondence				X			
300W002	Compose correspondence				X			
300W003	Compose reports				X			
300W004	Edit documents				X			

GENERAL OFFICE CLERK CLUSTER MATRIX

		R	T	ICC	MSC	SRC	FCL	RM
300W005	Prepare and send cablegrams, telegrams and mailgrams				X			
300W006	Dictate documents				X			
300W007	Abstract materials, such as articles, books or reports				X			
300W008	Compile statistical data				X			
300W009	Compose speeches				X			
300W010	Prepare and make oral presentations				X			
300W011	Prepare visual aids				X			
300W012	Prepare clerical/administrative services staff procedures manual				X			
300W013	Update clerical/administrative services staff procedures manual				X			
300W014	Develop clerical/administrative services users manual				X			
300W015	Update clerical/administrative services users manual				X			

PERFORMING FINANCIAL ACTIVITIES

		R	T	ICC	MSC	SRC	FCL	RM
300X001	Control petty cash fund				X			
300X002	Approve bills for payment				X			
300X003	Manage cash advance account				X			

RECEIVING, STORING AND MAINTAINING INCOMING MERCHANDISE

		R	T	ICC	MSC	SRC	FCL	RM
300Y001	Assist carrier unload (off-load) merchandise					X		
300Y002	Check invoice against purchase order					X		
300Y003	Mark identification on incoming shipment					X		
300Y004	Check number of cartons against bill of lading, freight bill or manifest					X		
300Y005	Inspect incoming cartons or containers for damage					X		
300Y006	Deliver incoming shipment to storage or work area					X		
300Y007	Unpack incoming shipment					X		
300Y008	Check unpacked merchandise against invoice or packing slip					X		
300Y009	Inspect unpacked merchandise for damage					X		
300Y010	Sort unpacked goods according to identification codes					X		
300Y011	Store unpacked merchandise in bins, racks or shelves in stockroom					X		
300Y012	Clean stockroom					X		
300Y013	Conduct on-going physical inventory of stock					X		
300Y014	Conduct periodic physical inventory of stock					X		
300Y015	Ticket/mark received goods					X		

ASSEMBLING, PACKING AND SHIPPING MERCHANDISE

		R	T	ICC	MSC	SRC	FCL	RM
300Z001	Affix postage to outbound shipment					X		
300Z002	Assemble goods for packing					X		
300Z003	Load outbound shipment for carrier					X		
300Z004	Mark identifying information and shipping instructions on outbound shipment					X		
300Z005	Pack outbound shipment					X		
300Z006	Verify outbound shipment with shipping records					X		
300Z007	Weigh outbound shipment					X		
300Z008	Move outbound shipment to shipping staging area					X		

GENERAL OFFICE CLERK CLUSTER MATRIX

PERFORMING ADMINISTRATIVE FUNCTIONS

		R	T	ICC	MSC	SRC	FCL	RM
300AA001	Assign shipping priorities for outbound goods					X		
300AA002	Assign storage space to new goods					X		
300AA003	Maintain bills of lading register					X		
300AA004	Maintain receiving apron					X		
300AA005	Maintain receiving log (tally)					X		
300AA006	Maintain inventory records					X		
300AA007	Prepare bills of lading					X		
300AA008	Prepare claims for incorrect or damaged goods received					X		
300AA009	Prepare inventory report					X		
300AA010	Prepare receiving report					X		
300AA011	Prepare overage, shortage and discrepancy (OSD) report					X		
300AA012	Process shipping papers on received shipment					X		
300AA013	Provide information to customer on outbound shipment					X		
300AA014	Record outbound shipment in shipment log					X		
300AA015	Requisition inhouse supplies or equipment					X		
300AA016	Seal door(s) of carrier					X		
300AA017	Select required materials-handling equipment for job					X		
300AA018	Select route and carrier for outbound shipment					X		

MAINTAINING FILING SYSTEM

		R	T	ICC	MSC	SRC	FCL	RM
300AB001	Replace worn file folders and labels						X	
300AB002	Prepare new file folders						X	
300AB003	Replace worn and damaged guide cards						X	
300AB004	Type information on file folder labels						X	
300AB005	Inspect files for accuracy						X	
300AB006	Label file boxes and containers for storage						X	
300AB007	Requisition filing supplies						X	
300AB008	Maintain file checkout system						X	
300AB009	Follow up on overdue files						X	

INVENTORYING RECORDS

		R	T	ICC	MSC	SRC	FCL	RM
300AC001	Develop inventory plan							X
300AC002	Determine inventory criteria							X
300AC003	Perform inventory							X
300AC004	Prepare summary of findings							X

DEVELOPING RETENTION SCHEDULES

		R	T	ICC	MSC	SRC	FCL	RM
300AD001	Determine current retention practices							X
300AD002	Review inventory							X
300AD003	Organize inventory into record series							X
300AD004	Analyze record types							X
300AD005	Identify vital records							X
300AD006	Research governmental and operational requirements							X
300AD007	Determine retention periods							X
300AD008	Publish retention schedules							X
300AD009	Coordinate record disposition							X

DEVELOPING FILING/RETRIEVAL SYSTEMS

		R	T	ICC	MSC	SRC	FCL	RM
300AE001	Analyze use of records							X
300AE002	Determine manual versus automated applications							X

GENERAL OFFICE CLERK CLUSTER MATRIX

		R	T	ICC	MSC	SRC	FCL	RM
300AE003	Establish classification and indexing criteria							X
300AE004	Design filing/retrieval systems							X
300AE005	Prepare cost analysis							X
300AE006	Develop proposal for file conversion							X
300AE007	Coordinate file conversion							X

ASSESSING EQUIPMENT AND SPACE

		R	T	ICC	MSC	SRC	FCL	RM
300AF001	Review current layout							X
300AF002	Inventory equipment							X
300AF003	Evaluate user needs							X
300AF004	Evaluate new equipment for purchase							X
300AF005	Design layouts							X
300AF006	Prepare cost justification							X
300AF007	Coordinate installation							X

EVALUATING EMERGING TECHNOLOGIES

		R	T	ICC	MSC	SRC	FCL	RM
300AG001	Develop library of resources							X
300AG002	Attend trade shows and seminars							X
300AG003	Interview vendors							X
300AG004	Visit user sites							X

PROVIDING LITIGATION/TAX SUPPORT

		R	T	ICC	MSC	SRC	FCL	RM
300AH001	Conduct document search							X
300AH002	Retrieve requested documents							X
300AH003	Index documents							X
300AH004	Prepare records policies and procedures for deposition							X
300AH005	Coordinate preparation of documents							X
300AH006	Implement records disposition							X
300AH007	Review hold status annually							X

COMMUNICATING

		R	T	ICC	MSC	SRC	FCL	RM
300AI001	Provide accountability reports							X
300AI002	Develop manuals							X
300AI003	Provide training							X
300AI004	Present workshops							X
300AI005	Develop proposals							X
300AI006	Develop professional contacts/networks							X
300AI007	Participate in professional associations							X

Education
For
Employment
Task Lists

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

PRODUCT ORIENTED MARKETING CLUSTER

Sales Clerk
Salesperson, General Merchandise
Salesperson, Women's Apparel and Accessories
Salesperson, Infant's and Children's Wear
Salesperson, Men's and Boy's Wear
Salesperson, Automobile Accessories
Stock Clerk, Self-Service
Cashier 1
Cashier 11
Cashier/Checker
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these matrices form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

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PRODUCT ORIENTED MARKETING CLUSTER MATRIX

SC = Sales Clerk
SG = Salesperson, General Merchandise
S = Salesperson, Women's Apparel and Accessories
S = Salesperson, Infants' and Children's Wear
SM = Salesperson, Men's and Boys' Wear
SA = Salesperson, Automobile Accessories
SS = Stock Clerk, Self-Service Store
C1 = Cashier I
C2 = Cashier II
C3 = Cashier/Checker
CRC = Customer Service Representative
ARC = Adjustment Clerk

SELLING MERCHANDISE

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330A001	Determine customer needs, wants and problems	X	X	X	X	X	X			X	X		
330A002	Determine availability of merchandise using computer terminal	X	X				X						
330A003	Locate merchandise for customer	X	X	X	X	X	X			X	X		
330A004	Demonstrate product use and care	X	X				X						
330A005	Present product features and benefits to overcome customer objections	X	X	X	X	X	X						
330A006	Sell related products, such as accessories	X	X	X	X	X							
330A007	Sell alternative merchandise when desired product is not available	X	X	X	X	X					X		
330A008	Sell larger quantities of merchandise	X	X	X	X	X							
330A009	Suggest catalog sales when item is not carried in store	X	X	X	X	X	X						
0A010	Inform customer of special promotions	X	X	X	X	X	X				X		
330A011	Process mail orders for merchandise	X	X	X	X	X					X		
330A012	Stimulate repeat business	X	X	X	X	X	X				X		
330A013	Develop mailing lists	X	X	X	X	X	X						
330A014	Follow up with customers	X	X	X	X	X	X						
330A015	Show customer variety of styles			X	X	X							
330A016	Show customer benefits of garment			X	X	X							
330A017	Show customer signs of quality construction in apparel			X	X	X							
330A018	Provide information to customer on types of fabric used in garment			X	X	X							
330A019	Provide information to customer on special finishes on garment fabric			X	X	X							
330A020	Provide information to customer on any guarantees on clothing			X	X	X							
330A021	Provide information on garment care to customer			X	X	X							
330A022	Mark garments for alteration			X	X	X							
330A023	Show customer fashionable ways to accessorize garments			X	X	X							
330A024	Greet customer	X	X	X	X	X	X						
330A025	Close sale	X	X	X	X	X	X						
330A026	Process telephone orders for merchandise	X	X	X	X	X	X						
330A027	Locate automotive accessories on selling floor						X						
30A028	Locate automotive accessories in catalogs						X						
30A029	Locate automotive accessories using microfiche system						X						

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330A030	Sell merchandise related to automotive electrical system						X						
0A031	Sell merchandise related to automotive carburetion and fuel systems						X						
330A032	Sell merchandise related to automotive heating, cooling, exhaust and emission systems						X						
330A033	Sell merchandise related to automotive suspension, steering and braking systems						X						
330A034	Sell automotive replacement merchandise, such as belts, filters and windshield wiper blades						X						
330A035	Sell merchandise to maintain the interior and exterior appearance of vehicle						X						
330A036	Sell automotive related merchandise, such as car top carriers, trailers, jacks and tools						X						
330A037	Sell tickets for events using ticket dispensing machine									X			
330A038	Sell tickets for events using computerized system									X			
330A039	Sell gift certificates									X			
330A040	Provide information on events or merchandise, such as quality, special features, benefits and guarantees									X	X		
330A041	Process mail orders for tickets									X	X		
330A042	Sell tickets for alternative events or alternative merchandise									X			

PERFORMING SALES-RELATED ACTIVITIES

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
30B001	Open store or department	X	X	X	X	X	X						
330B002	Process cash or check sales transaction using electric cash register	X	X	X	X	X	X			X	X		
330B003	Process cash or check sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X		
330B004	Process cash or check sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				X		
330B005	Process debit card sales transaction using electric cash register	X	X	X	X	X	X			X	X		
330B006	Process debit card sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X		
330B007	Process debit card sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				X		
330B008	Process bank credit card sales transaction using electric cash register	X	X	X	X	X	X			X	X		
330B009	Process bank credit card sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X		
330B010	Process bank credit card sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				X		
330B011	Calculate cash discounts						X						
330B012	Process store charge sales transaction using electric cash register	X	X	X	X	X	X			X	X		
0B013	Process store charge sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X		

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330B014	Process store charge sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X						
330B015	Secure merchandise while in storage area or stockroom							X					
330B016	Process installment credit sale		X	X	X	X	X						
330B017	Secure customer credit information		X	X	X	X	X						
330B018	Package customer's purchase	X	X	X	X	X	X	X			X		
330B019	Gift wrap merchandise	X	X	X	X	X					X		
330B020	Process customer complaint	X	X	X	X	X	X	X	X	X	X		
330B021	Close out cash register	X	X	X	X	X	X		X	X	X		
330B022	Prepare sales slip	X	X	X	X	X	X				X		
330B023	Close store or department	X	X	X	X	X	X						
330B024	Detect and report shoplifting	X	X	X	X	X	X	X	X	X	X		
330B025	Detect and report counterfeit currency	X	X	X	X	X	X		X	X	X		
330B026	Change cash register tape	X	X	X	X	X	X		X	X	X		
330B027	Report employee pilferage	X	X	X	X	X	X	X	X	X	X		
330B028	Detect and report fraudulent credit card	X	X	X	X	X	X		X	X	X		
330B029	Detect and report fraudulent check	X	X	X	X	X	X		X	X	X		
330B030	Process customer returns that are possible scams	X	X	X	X	X	X			X	X		
330B031	Follow procedures for conduct during and after robbery	X	X	X	X	X	X	X	X	X	X		
330B032	Call manufacturers to check on orders	X	X	X	X	X	X						
330B033	Write initial raincheck	X	X	X	X	X	X						
330B034	Process sales and returns with discounts, such as employee or senior citizen discounts	X	X	X	X	X	X			X	X		
0B035	Measure customer for clothing			X	X	X							
0B036	Restore fabric snags			X	X	X							
330B037	Process foster children's saleschecks				X								
330B038	Process children's homes saleschecks				X								
330B039	Assist non-profit organizations with their sales			X	X	X							
330B040	Arrange for donation of shopworn merchandise to local agencies			X	X	X							
330B041	Process customer's exchange	X	X	X	X	X				X			
330B042	Process customer's cash refund for returned merchandise	X	X	X	X	X				X			
330B043	Process charge credit for returned merchandise	X	X	X	X	X				X			
330B044	Process lay-away sale	X	X	X	X	X							
330B045	Process coupon sales transaction	X	X	X	X	X							
330B046	Process gift certificate sales transaction	X	X	X	X	X			X	X	X		
330B047	Process rain check sales transaction	X	X	X	X	X				X	X		
330B048	Respond to customer complaint	X	X	X	X	X							
330B049	Requisition supplies, such as saleschecks/packaging supplies	X	X	X	X	X							
330B050	Weigh items on electronic scale	X	X								X		
330B051	Process customer through cafeteria checkout									X			
330B052	Correct cash register errors	X	X	X	X	X	X				X		

RECEIVING AND STORING INCOMING MERCHANDISE

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
0C001	Assist carrier unload (off-load) merchandise							X					
330C002	Check invoice against purchase order							X					

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330C003	Check number of cartons against bill of lading, freight bill or manifest							X					
0C004	Prepare overage, shortage and discrepancy (OSD) report							X					
330C005	Inspect incoming cartons or containers for damage							X					
330C006	Deliver incoming shipment to storage or work area using hand truck							X					
330C007	Unpack incoming shipment							X					
330C008	Check unpacked merchandise against invoice or packing slip							X					
330C009	Inspect unpacked merchandise for damage							X					
330C010	Sort unpacked goods according to identification codes							X					
330C011	Store unpacked merchandise in bins, racks or shelves in stockroom							X					
330C012	Clean stockroom							X					

PERFORMING MERCHANDISING DUTIES

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330D001	Process incoming merchandise	X	X	X	X	X	X				X		
330D002	Return damaged merchandise	X	X	X	X	X	X	X			X		
330D003	Prepare merchandise for stock or immediate store display	X	X	X	X	X	X	X			X		
330D004	Code and date stock	X	X	X	X	X	X	X			X		
330D005	Price merchandise using ticketing machine	X	X	X	X	X	X	X			X		
330D006	Price merchandise using price stamper	X	X				X	X			X		
0D007	Price merchandise using gummed tags	X	X	X	X	X	X	X			X		
30D008	Price merchandise using tie-on tickets	X	X	X	X	X		X					
330D009	Price merchandise using pin tickets	X	X	X	X	X		X					
330D010	Price merchandise using ticketing equipment with security tags	X	X	X	X	X	X	X			X		
330D011	Take price markups or markdowns as designated	X	X	X	X	X	X	X			X		
330D012	Take progressive markdowns on shopworn or damaged goods	X	X	X	X	X	X	X			X		
330D013	Remove damaged, obsolete or out-of-date merchandise from display or stock	X	X	X	X	X	X	X			X		
330D014	Stock merchandise on shelves, counters, tables, racks or in display cases	X	X	X	X	X	X	X			X		
330D015	Place price cards on shelves		X				X	X			X		
330D016	Straighten merchandise on shelves, counters, tables, racks or in display cases	X	X	X	X	X	X	X			X		
330D017	Clean shelves, counters, tables or display cases	X	X	X	X	X	X	X			X		
330D018	Rotate dated stock on shelves		X					X					
330D019	Pull and assemble merchandise for sales floor							X					
330D020	Deliver marked merchandise to the sales floor for display							X					
330D021	Check accuracy of stocked shelves							X					
330D022	Change price on merchandise	X	X	X	X	X							
330D023	Face shelves	X											
330D024	Take physical inventory of stock	X	X	X	X	X							
30D025	Steam badly wrinkled clothing			X	X	X							
0D026	Maintain alignment of racks	X	X	X	X	X							

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

	SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330D027 Maintain fitting rooms			X	X	X							
D028 Keep records of merchandise sold using ticket stubs	X	X	X	X	X							

PREPARING MERCHANDISE DISPLAY

	SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330E001 Assemble merchandise for display		X	X	X	X	X				X		
330E002 Set up counter display	X	X	X	X	X	X	X			X		
330E003 Set up manufacturer's display	X	X	X	X	X	X	X			X		
330E004 Set up window display	X	X	X	X	X	X	X			X		
330E005 Set up interior display	X	X	X	X	X	X				X		
330E006 Set up end-of-aisle display	X	X	X	X	X	X	X			X		
330E007 Set up display in display case	X	X	X	X	X	X	X			X		
330E008 Set up table display	X	X	X	X	X	X	X			X		
330E009 Dismantle merchandise display	X	X	X	X	X	X	X			X		
330E010 Prepare point-of-sale sign or banner by hand	X	X	X	X	X	X						
330E011 Prepare point-of-sale sign or banner using sign press	X	X	X	X	X	X						
330E012 Set up advertised merchandise for sale	X	X	X	X	X	X	X			X		
330E013 Dress mannequin	X	X	X	X	X							
330E014 Accessorize display merchandise	X	X	X	X	X							
330E015 Clean and straighten up display	X	X	X	X	X	X						
330E016 Set up advertising signs			X				X					

PERFORMING CLERICAL-RELATED ACTIVITIES

	SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
0F001 Process telephone orders for merchandise	X	X	X	X	X	X						
0F002 Arrange for delivery of merchandise	X	X	X	X	X	X						
330F003 Process customer's exchange	X	X	X	X	X	X						
330F004 Process customer's cash refund for returned merchandise	X	X	X	X	X	X						
330F005 Process customer's charge credit for returned merchandise	X	X	X	X	X	X						
330F006 Process lay-away sale	X	X	X	X	X	X						
330F007 Process special order for merchandise	X	X	X	X	X	X	X					
330F008 Prepare gift certificate	X	X	X	X	X							
330F009 Redeem food stamps or promotional coupon	X	X	X	X	X	X		X	X	X		
330F010 Process back order for merchandise	X	X	X	X	X	X						
330F011 Process store transfer of merchandise	X	X	X	X	X	X	X					
330F012 Prepare bank deposit	X	X	X	X	X	X		X	X	X		
330F013 Requisition supplies, such as saleschecks, cash register tapes and packaging supplies	X	X	X	X	X	X		X	X	X		
330F014 Issue trading stamps	X	X	X	X	X					X		
330F015 Redeem trading stamps	X	X	X	X	X					X		
330F016 Conduct on-going physical inventory	X	X	X	X	X	X	X					
330F017 Conduct periodic physical inventory	X	X	X	X	X	X	X					
330F018 Prepare stock order forms							X					
330F019 Prepare stock record cards and bin tickets							X					
330F020 File stock record cards							X					
330F021 Process clothing alteration paperwork			X	X	X							
330F022 Maintain a current clientele book or card file of customers			X	X	X							
0F023 Cash checks								X	X	X		
30F024 Issue credit memorandum for returned merchandise	X	X	X	X	X			X	X			

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330F025	Prepare cash drawer for daily business	X	X	X	X	X			X	X	X		
0F026	Process payments on accounts receivable using computerized system									X			
330F027	Balance cash drawer at end of day	X	X	X	X	X	X		X	X	X		

PERFORMING ACCOUNTING-RELATED ACTIVITIES

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330G001	Process cash payment of account using bookkeeping machine								X				
330G002	Process cash payment of account using computerized system								X				
330G003	Process accounts paid by check using bookkeeping machine								X				
330G004	Process accounts paid by check using computerized system								X				
330G005	Process account paid by credit card using bookkeeping machine								X				
330G006	Process account paid by credit card using computerized system								X				
330G007	Process pre-payment of account using bookkeeping machine								X				
330G008	Process pre-payment of account using computerized system								X				
330G009	Process vouchers for payment of company expenditures manually								X				
330G010	Process vouchers for payment of company expenditures using bookkeeping machine								X				
0G011	Process vouchers for payment of company expenditures using computerized system								X				
330G012	Reconcile bank statement								X				
330G013	Prepare collection and disbursement reports manually								X				
330G014	Prepare collection and disbursement reports using bookkeeping machine								X				
330G015	Prepare collection and disbursement reports using computerized system								X				
330G016	Post customer's charges using bookkeeping machine								X				
330G017	Post customer's charges using computerized system								X				
330G018	Balance daily debits and credits to accounts								X				

CONTACTING CUSTOMERS VIA TELEPHONE, MAIL OR DIRECT CONTACT

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330H001	Identify inquiry/complaint											X	X
330H002	Acknowledge customer request											X	
330H003	Perform preliminary investigation											X	
330H004	Refer request to appropriate department or outside agency											X	
330H005	Resolve requests											X	
330H006	Confirm customer understanding/satisfaction											X	
330H007	Refer requests to superior if necessary											X	
0H008	Acknowledge receipt of customer complaint												X
30H009	Send information requested by customer												X

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330H010	Refer customer to outside agency or department												X
[illegible]0H011	Determine if further investigation is needed												X

PROVIDING GENERAL SERVICES

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330I001	Receive information from customers to update billing											X	
330I002	Make payment arrangements											X	
330I003	Provide special services for handicapped											X	
330I004	Make appointments											X	
330I005	Make delivery arrangements											X	
330I006	Make pickup arrangements											X	
330I007	Handle cancellation requests											X	
330I008	Handle requests for catalogs/directories											X	
330I009	Handle payments											X	
330I010	Initiate requests for lost/stolen credit cards/payments											X	

TAKING ORDERS

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330J001	Take new applications											X	
330J002	Make changes in existing services											X	
330J003	Transfer services											X	
330J004	Take parts orders											X	
330J005	Take orders for additional services											X	
330J006	Handle special requests											X	
[illegible]30J007	Take catalog orders											X	

PROVIDING INFORMATION

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330K001	Handle requests for mail-outs, such as payment envelopes and order forms											X	
330K002	Answer general billing questions											X	
330K003	Provide general information about company											X	
330K004	Provide rate information											X	
330K005	Refer customers to outside agencies											X	
330K006	Provide specific product information											X	
330K007	Explain bill calculations											X	
330K008	Provide shipping information											X	
330K009	Direct customers to other departments											X	
330K010	Recommend cost-saving services											]	

MAINTAINING PROFESSIONAL SKILLS

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330L001	Train new customer service representatives											X	
330L002	Cross-train in all aspects of the job											X	X
330L003	Update training and new procedures											X	X
330L004	Recommend internal improvements in company policies and procedures											X	X
330L005	Train new adjustment clerks												X

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

INVESTIGATING/ANALYZING CUSTOMER COMPLAINT

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330M001	Research customer records												X
[illegible]0M002	Request further information from customer												X
330M003	Research company records												X
330M004	Compare customer and company records												X
330M005	Request information from outside agencies, departments or stores												X
330M006	Conduct in-depth investigation												X
330M007	Refer to other departments, stores or agencies												X

INVESTIGATING/ANALYZING CUSTOMER ACCOUNTS

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
330N001	Spot-check accounts												X
330N002	Audit individual accounts												X
330N003	Update customer records												X
330N004	Investigate missing payments												X
330N005	Handle requests for lost/stolen credit cards												X

RESOLVING CUSTOMER COMPLAINTS

		SC	SG	SW	SI	SM	SA	SS	C1	C2	C3	CRC	ARC
3300001	Explain the results of the investigation to customer												X
3300002	Confirm customer understanding/satisfaction												X
3300003	Process credits/debits												X
3300004	Process refunds												X
3300005	Explain company policies to customers												X
3300006	Recommend preventive measures to customers												X
[illegible]00007	Recommend cost-saving services												X
3300008	Make payment arrangements												X
3300009	Adjust customer's credit bureau records												X
3300010	Correct internal company records												X
3300011	Notify department or outside agency of resolution												X

Education For Employment Task Lists

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SERVICE ORIENTED MARKETING CLUSTER

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Customer Service Representative
Adjustment Clerk
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SERVICE ORIENTED MARKETING CLUSTER MATRIX

TE = Teller
CRC = Customer Service Representative
ARC = Adjustment Clerk

PLANNING AND ORGANIZING

		TE	CRC	ARC
360A001	Obtain strapped currency to supply cash buggy for day's transactions	X		
360A002	Obtain rolled coin to supply cash buggy for day's transactions	X		
360A003	Prepare strapped currency for placement in the cash drawer	X		
360A004	Arrange working currency in cash drawer	X		
360A005	Arrange coin in coin tray for day's transactions	X		
360A006	Arrange reserve currency and coin in storage drawer	X		
360A007	Organize teller's stamps for ease in using	X		

PROCESSING CUSTOMER TRANSACTIONS

		TE	CRC	ARC
360B001	Process Christmas Club payments	X		
360B002	Process installment loan payments	X		
360B003	Advance cash on bank credit cards	X		
360B004	Cash single check	X		
360B005	Cash batch of checks	X		
360B006	Certify checks	X		
360B007	Cash certified checks	X		
360B008	Issue U. S. Government savings bond	X		
360B009	Cash U. S. Government savings bond	X		
360B010	Process bond coupons for cash	X		
360B011	Process bond coupons for deposit	X		
360B012	Process deposits from night depository	X		
360B013	Process cash deposits	X		
360B014	Process check deposits	X		
360B015	Process certified checks	X		
360B016	Process combination cash and check deposits	X		
360B017	Process less-cash deposits	X		
360B018	Enter amount of interest in savings passbook	X		
360B019	Process savings withdrawal	X		
360B020	Issue certificates of deposit	X		
360B021	Redeem certificates of deposit	X		
360B022	Issue cashier's check	X		
360B023	Issue bank draft	X		
360B024	Issue money order	X		
360B025	Issue traveler's checks	X		
360B026	Cash traveler's checks	X		
360B027	Process coin or currency change orders	X		
360B028	Fill payroll requests	X		
360B029	Answer customer inquiries for information, such as account balance	X		
360B030	Issue foreign currency	X		
360B031	Process foreign currency	X		
360B032	Enter transactions in teller machine	X		
360B033	Issue deposit/payment receipt using teller machine	X		
360B034	Accept federal tax payments	X		
360B035	Accept utility payments	X		
360B036	Accept property tax payments	X		
360B037	Accept food stamp deposits	X		

SERVICE ORIENTED MARKETING CLUSTER MATRIX

		TE	CRC	ARC
360B038	Obtain information from microfiche or microfilm	X		
360B039	Transfer funds between accounts by telephone	X		

PROCESSING MONEY

		TE	CRC	ARC
360C001	Process excess currency and coin	X		
360C002	Process counterfeit currency	X		
360C003	Process mutilated and badly worn currency	X		
360C004	Count and wrap coin by hand	X		
360C005	Count and wrap coin using coin counter	X		
360C006	Sort and stack coins	X		
360C007	Sort and stack currency	X		
360C008	Strap currency	X		
360C009	Count loose coin	X		
360C010	Count rolled coin	X		
360C011	Count boxed coin	X		
360C012	Count loose currency	X		
360C013	Count stacked currency	X		
360C014	Count strapped currency	X		
360C015	Verify strapped currency amount	X		

PROMOTING CUSTOMER RELATIONS

		TE	CRC	ARC
360D001	Greet customer	X		
360D002	Dismiss customer	X		
360D003	Cross-sell financial services	X		
360D004	Explain policies and procedures to customers	X		

PERFORMING CLERICAL-RELATED ACTIVITIES

		TE	CRC	ARC
360E001	Prepare cash drawer for daily business	X		
360E002	Duplicate materials using photocopying machine	X		
360E003	Process outgoing mail	X		
360E004	Process incoming mail	X		
360E005	File materials using numeric filing system	X		
360E006	Process incoming calls on telephone	X		
360E007	Process outgoing calls on telephone	X		
360E008	Clean and straighten up work area	X		
360E009	Equip teller window with banking forms and supplies	X		
360E010	Process check order or reorder	X		
360E011	Close account	X		
360E012	Place stop payment on check	X		
360E013	Process safe deposit box rental fee	X		
360E014	Process address change on customer account	X		
360E015	Place hold on customer account	X		
360E016	Prepare deposit slip for customer	X		
360E017	Prepare cash-in and cash-out tickets	X		
360E018	Buy money from vault	X		
360E019	Sell money to vault	X		
360E020	Buy money from other tellers/cashiers	X		
360E021	Sell money to other tellers/cashiers	X		
360E022	Balance teller window using adding machine or calculator	X		
360E023	Balance teller window using teller machine	X		
360E024	Type bank forms	X		
360E025	Type envelopes	X		

SERVICE ORIENTED MARKETING CLUSTER MATRIX

		TE	CRC	ARC
360E026	Follow procedures for conduct during and after robbery	X		
360E027	Follow procedures for safekeeping money in cash drawer/ teller's window	X		
360E028	Balance cash drawer at end of day	X		

CONTACTING CUSTOMERS VIA TELEPHONE, MAIL OR DIRECT CONTACT

		TE	CRC	ARC
360F001	Identify inquiry/complaint		X	X
360F002	Acknowledge customer request		X	
360F003	Perform preliminary investigation		X	
360F004	Refer request to appropriate department or outside agency		X	
360F005	Resolve requests		X	
360F006	Confirm customer understanding/satisfaction		X	
360F007	Refer requests to superior if necessary		X	
360F008	Acknowledge receipt of customer complaint			X
360F009	Send information requested by customer			X
360F010	Refer customer to outside agency or department			X
360F011	Determine if further investigation is needed			X

PROVIDING GENERAL SERVICES

		TE	CRC	ARC
360G001	Receive information from customers to update billing		X	
360G002	Make payment arrangements		X	
360G003	Provide special services for handicapped		X	
360G004	Make appointments		X	
360G005	Make delivery arrangements		X	
360G006	Make pickup arrangements		X	
360G007	Handle cancellation requests		X	
360G008	Handle requests for catalogs/directories		X	
360G009	Handle payments		X	
360G010	Initiate requests for lost/stolen credit cards/payments		X	

TAKING ORDERS

		TE	CRC	ARC
360H001	Take new applications		X	
360H002	Make changes in existing services		X	
360H003	Transfer services		X	
360H004	Take parts orders		X	
360H005	Take orders for additional services		X	
360H006	Handle special requests		X	
360H007	Take catalog orders		X	

PROVIDING INFORMATION

		TE	CRC	ARC
360I001	Handle requests for mail-outs, such as payment envelopes and order forms		X	
360I002	Answer general billing questions		X	
360I003	Provide general information about company		X	
360I004	Provide rate information		X	
360I005	Refer customers to outside agencies		X	
360I006	Provide specific product information		X	
360I007	Explain bill calculations		X	
360I008	Provide shipping information		X	
360I009	Direct customers to other departments		X	
360I010	Recommend cost-saving services		X	

SERVICE ORIENTED MARKETING CLUSTER MATRIX

MAINTAINING PROFESSIONAL SKILLS

		TE	CRC	ARC
360J001	Train new customer service representatives		X	
360J002	Cross-train in all aspects of the job		X	X
360J003	Update training and new procedures		X	X
360J004	Recommend internal improvements in company policies and procedures		X	X
360J005	Train new adjustment clerks			X

INVESTIGATING/ANALYZING CUSTOMER COMPLAINT

		TE	CRC	ARC
360K001	Research customer records			X
360K002	Request further information from customer			X
360K003	Research company records			X
360K004	Compare customer and company records			X
360K005	Request information from outside agencies, departments or stores			X
360K006	Conduct in-depth investigation			X
360K007	Refer to other departments, stores or agencies			X

INVESTIGATING/ANALYZING CUSTOMER ACCOUNTS

		TE	CRC	ARC
360L001	Spot-check accounts			X
360L002	Audit individual accounts			X
360L003	Update customer records			X
360L004	Investigate missing payments			X
360L005	Handle requests for lost/stolen credit cards			X

RESOLVING CUSTOMER COMPLAINTS

		TE	CRC	ARC
360M001	Explain the results of the investigation to customer			X
360M002	Confirm customer understanding/satisfaction			X
360M003	Process credits/debits			X
360M004	Process refunds			X
360M005	Explain company policies to customers			X
360M006	Recommend preventive measures to customers			X
360M007	Recommend cost-saving services			X
360M008	Make payment arrangements			X
360M009	Adjust customer's credit bureau records			X
360M010	Correct internal company records			X
360M011	Notify department or outside agency of resolution			X

Education
For
Employment
Task Lists

Illinois
State Board of
Education

Adult
Vocational and
Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

1988

BUSINESS OWNERSHIP/MANAGEMENT CLUSTER

Small Business Owner/Operator
Sales Manager, Retail Trade
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list

NOTE:

The duties and tasks found in these matrices form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

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BUSINESS OWNERSHIP/MANAGEMENT CLUSTER MATRIX

SB = Small Business Owner/Operator
SMR = Sales Manager, Retail Trade

ESTABLISHING A SMALL BUSINESS

		SB	SMR
400A001	Obtain technical assistance from professionals, such as attorneys, insurance agents and management consultants	X	
400A002	Conduct market survey	X	
400A003	Complete location feasibility study	X	
400A004	Select business location	X	
400A005	Determine legal form of organization	X	
400A006	Prepare loan application package	X	
400A007	Obtain venture capital	X	
400A008	Follow steps to file ownership for business	X	
400A009	Comply with government regulations	X	
400A010	Obtain insurance, such as fire, liability and worker's compensation	X	
400A011	Choose kind of business to establish	X	
400A012	Select business opportunity	X	
400A013	Select business name	X	

PLANNING AND BUDGETING

		SB	SMR
400B001	Prepare business plan	X	X
400B002	Plan goals and objectives for business	X	X
400B003	Establish and diagram the business organizational structure	X	
400B004	Establish operating policies and procedures	X	
400B005	Develop action plans to meet specific goals	X	X
400B006	Develop business/marketing plan	X	
400B007	Develop sales forecast	X	X
400B008	Prepare operating budget	X	
400B009	Develop expense-control plan	X	
400B010	Evaluate business performance compared to action plan	X	X
400B011	Analyze operating results in relation to budget	X	X
400B012	Take corrective steps to bring performance in line with action plan and budget	X	X
400B013	Follow established operating policies and procedures		X
400B014	Prepare store budget(s)		X

MANAGING BUSINESS OPERATIONS

		SB	SMR
400C001	Design business layout	X	X
400C002	Determine equipment and supplies needed	X	X
400C003	Purchase equipment and supplies	X	X
400C004	Establish policies and procedures for business security	X	X
400C005	Follow established procedures for handling theft	X	X
400C006	Follow established security procedures for opening and closing the business	X	X
400C007	Establish safety program	X	X
400C008	Follow procedures in handling employee or customer accidents	X	X
400C009	Establish maintenance and housekeeping program	X	X
400C010	Negotiate service and maintenance contracts	X	
400C011	Establish fire prevention program	X	X
400C012	Follow procedures for handling fires	X	X

BUSINESS OWNERSHIP/MANAGEMENT CLUSTER MATRIX

		SB	SMR
400C013	Recognize and correct hazardous conditions	X	X
400C014	Establish customer service policies and procedures	X	X
400C015	Evaluate business operations	X	X
400C016	Requisition equipment and supplies		X
400C017	Follow established maintenance and housekeeping program		X
400C018	Comply with OSHA regulations		X
400C019	Report property damage		X
400C020	Prepare reports for home office		X
400C021	Serve as liaison between store and home office		X

MANAGING HUMAN RESOURCES

		SB	SMR
400D001	Determine personnel needs	X	X
400D002	Prepare detailed job description for each position	X	X
400D003	Develop hiring policies and procedures	X	
400D004	Apply hiring policies and procedures	X	X
400D005	Comply with state and federal employment laws for hiring	X	X
400D006	Recruit employees	X	X
400D007	Select job applicants for interviews	X	X
400D008	Conduct job interview	X	X
400D009	Select employees	X	X
400D010	Conduct employee orientation	X	X
400D011	Train employees	X	X
400D012	Schedule employees	X	X
400D013	Delegate responsibility and authority to employees	X	X
400D014	Counsel employees	X	X
400D015	Establish criteria and procedures for evaluating employees	X	
400D016	Evaluate employee performance	X	
400D017	Discipline employees	X	X
400D018	Discharge employees	X	X
400D019	Establish system of salaries, commissions, bonuses and quotas	X	
400D020	Assign work to employees		X
400D021	Follow established criteria and procedures for evaluating employees		X
400D022	Process employee transfer records		X
400D023	Process employee termination records		X
400D024	Conduct exit interview		X
400D025	Apply established system of salaries, commissions, bonuses and quotas		X
400D026	Process payroll time records		X
400D027	Distribute payroll checks		X
400D028	Implement bargaining unit rules		X
400D029	Conduct staff meeting		X
400D030	Administer fringe benefits program		X
400D031	Interpret and apply labor laws and regulations		X
400D032	Establish personnel policies and procedures	X	
400D033	Develop personnel handbook	X	
400D034	Develop job application form	X	

EXTENDING CREDIT

		SB	SMR
400E001	Establish credit policies and procedures	X	
400E002	Explain credit policies and procedures to employees and customers	X	X

BUSINESS OWNERSHIP/MANAGEMENT CLUSTER MATRIX

		SB	SMR
400E003	Secure customer credit information	X	X
400E004	Obtain credit reference information from credit bureau	X	X
400E005	Supply credit reference information to credit bureau	X	X
400E006	Age customer accounts	X	
400E007	Approve charges to customer accounts	X	X
400E008	Discuss delinquent accounts with customers	X	
400E009	Initiate legal action on delinquent accounts	X	
400E010	Follow established credit policies and procedures		X
400E011	Evaluate credit application	X	
400E012	Follow up on delinquent accounts	X	

PERFORMING MERCHANDISING DUTIES

		SB	SMR
400F001	Prepare merchandise plan	X	X
400F002	Implement seasonal merchandise plan	X	X
400F003	Determine inventory on hand	X	X
400F004	Prepare open-to-buy	X	
400F005	Select suppliers	X	
400F006	Order merchandise	X	X
400F007	Forecast merchandise reorders	X	X
400F008	Process incoming merchandise	X	X
400F009	Return damaged merchandise	X	X
400F010	Plan merchandise storage space	X	X
400F011	Prepare merchandise for stock or immediate store display	X	X
400F012	Code and date stock	X	X
400F013	Establish pricing policies	X	
400F014	Price merchandise using ticketing machine	X	
400F015	Price merchandise using price stamper	X	
400F016	Price merchandise using gummed tags	X	
400F017	Price merchandise using tie-on tickets	X	
400F018	Price merchandise using ticketing equipment with security tags	X	
400F019	Price merchandise using pin tickets	X	
400F020	Remove damaged, obsolete or out-of-date merchandise from display or stock	X	X
400F021	Stock merchandise on shelves, counters, tables, racks or in display cases	X	X
400F022	Place price cards on shelves	X	
400F023	Straighten merchandise on shelves, counters, tables, racks or in display cases	X	
400F024	Clean shelves, counters, tables or display cases	X	
400F025	Rotate dated stock on shelves	X	X
400F026	Establish inventory control program	X	
400F027	Conduct periodic physical inventory	X	X
400F028	Conduct on-going physical inventory	X	X
400F029	Establish price markups and markdowns for merchandise or services	X	
400F030	Take price markups or markdowns	X	X
400F031	Take progressive markdowns on shopworn or damaged goods	X	X
400F032	Sign advertised merchandise with sale signs	X	X
400F033	Set up advertised merchandise for sale	X	X
400F034	Assemble merchandise for display	X	X
400F035	Set up merchandise displays	X	X
400F036	Coordinate merchandise displays with advertised merchandise	X	X

		SB	SMR
400F037	Clean, tidy up and repair displays	X	X
400F038	Dismantle displays	X	X
400F039	Prepare point-of-sale sign or banner by hand	X	X
400F040	Prepare point-of-sale sign or banner using a sign press	X	X
400F041	Select merchandise to be put on sale	X	X
400F042	Calculate stock turnover		X
400F043	Follow established pricing policies		X
400F044	Supervise price marking of merchandise		X
400F045	Supervise cleaning and straightening of merchandise on shelves, counters, tables, racks or in display cases		X
400F046	Follow established inventory control program		X
400F047	Establish merchandise policies	X	
400F048	Establish price for merchandise	X	

ADVERTISING AND SALES PROMOTIONS

		SB	SMR
400G001	Establish advertising/promotional budget	X	X
400G002	Prepare advertising/promotional plan	X	X
400G003	Prepare advertising calendar	X	X
400G004	Determine target market	X	
400G005	Select promotional products, merchandise or services	X	X
400G006	Select advertising media	X	X
400G007	Develop print advertising copy	X	X
400G008	Proof print advertising copy	X	X
400G009	Develop radio advertisement	X	X
400G010	Develop television advertisement	X	X
400G011	Develop direct mail advertisement	X	X
400G012	Develop transit advertisement	X	X
400G013	Select advertising agency	X	
400G014	Evaluate and interpret the results of advertising	X	X
400G015	Provide merchandise demonstrations	X	X
400G016	Provide free samples of merchandise	X	X
400G017	Hold promotional contest	X	X
400G018	Plan community relations	X	X

PERFORMING ACCOUNTING-RELATED ACTIVITIES

		SB	SMR
400H001	Establish manual payroll system	X	
400H002	Establish computerized payroll system	X	
400H003	Prepare payroll using manual payroll system	X	
400H004	Input data to prepare payroll using computer system	X	
400H005	Prepare payroll statements manually	X	
400H006	Input data to prepare payroll statements using computer system	X	
400H007	Prepare employee's form W-2 manually	X	
400H008	Prepare employee's form W-2 using computer system	X	
400H009	Prepare federal and state tax returns manually	X	
400H010	Prepare federal and state tax returns using computer system	X	
400H011	Record opening entries for new business using manual bookkeeping system	X	
400H012	Input accounting entries to open bookkeeping system for new business using computer system	X	
400H013	Record accounting entries in manual bookkeeping system	X	

		SB	SMR
400H014	Input accounting entries in computerized bookkeeping system	X	
400H015	Issue monthly customer account statements	X	
400H016	Write receipts for check and cash sales	X	X
400H017	Record accounting entries using peg board	X	
400H018	Prepare periodic reports and financial statements manually	X	
400H019	Prepare periodic reports and financial statements using computer system	X	
400H020	Write checks to pay bills for business	X	
400H021	Print checks to pay bills for business using computer system	X	
400H022	Establish manual inventory control system	X	
400H023	Establish computerized inventory control system	X	
400H024	Maintain manual inventory control system	X	X
400H025	Maintain computerized inventory control system	X	X
400H026	Prepare bank deposit	X	X
400H027	Reconcile bank statement	X	
400H028	Analyze financial statements using financial ratios	X	X
400H029	Select bookkeeping/accounting service	X	
400H030	Establish basic filing system	X	X
400H031	Maintain petty cash fund	X	X
400H032	Prepare cash flow statement	X	

SELLING MERCHANDISE

		SB	SMR
400I001	Determine customer needs, wants and problems	X	X
400I002	Determine availability of merchandise using computer terminal	X	X
400I003	Locate merchandise for customer	X	X
400I004	Demonstrate product use	X	X
400I005	Present product features and benefits to overcome customer objections	X	X
400I006	Locate and sell related products, such as accessories	X	X
400I007	Locate and sell alternative merchandise when the desired product is not available	X	X
400I008	Suggest catalog sales when item is not carried in the store	X	X
400I009	Locate and sell larger quantities of merchandise	X	X
400I010	Stimulate repeat business	X	X
400I011	Develop mailing lists	X	X
400I012	Follow up with customers	X	X

PERFORMING SALES-RELATED ACTIVITIES

		SB	SMR
400J001	Open store	X	X
400J002	Process cash or check sales transaction using electric cash register	X	X
400J003	Process cash or check sales transaction using electronic point-of-sale cash register	X	X
400J004	Process debit card sales transaction using electric cash register	X	X
400J005	Process debit card sales transaction using electronic point-of-sale cash register	X	X
400J006	Process charge card sales transaction using electric cash register	X	X

BUSINESS OWNERSHIP/MANAGEMENT CLUSTER MATRIX

		SB	SMR
400J007	Process charge card sales transaction using electronic point-of-sale cash register	X	X
400J008	Package customer's purchase	X	X
400J009	Gift wrap merchandise	X	
400J010	Process customer complaint	X	X
400J011	Close out cash register	X	X
400J012	Close store	X	X
400J013	Detect and report shoplifting	X	X
400J014	Detect and report counterfeit currency	X	X
400J015	Detect employee pilferage	X	X
400J016	Detect and report fraudulent credit card	X	X
400J017	Detect and report fraudulent check	X	X
400J018	Follow procedures for conduct during and after robbery	X	X
400J019	Prepare sales slip	X	X
400J020	Write initial raincheck	X	X
400J021	Process sales and returns with discounts, such as employee or senior citizen discounts	X	X
400J022	Process customer returns that are possible scams	X	X
400J023	Call manufacturers to check on orders	X	X
400J024	Process cash or check sales transaction using optical scanning equipment attached to cash register		X
400J025	Process debit card sales transaction using optical scanning equipment attached to cash register		X
400J026	Process charge card sales transaction using optical scanning equipment attached to cash register		X
400J027	Program cash register prices		X
400J028	Approve customer checks for purchase of merchandise or for cash		X

PERFORMING CLERICAL-RELATED ACTIVITIES

		SB	SMR
400K001	Arrange for delivery of merchandise	X	X
400K002	Process customer's exchange	X	X
400K003	Process customer's cash refund for returned merchandise	X	X
400K004	Process customer's charge credit for returned merchandise	X	X
400K005	Process lay-away sale	X	X
400K006	Process special order for merchandise	X	X
400K007	Prepare gift certificate	X	X
400K008	Process gift certificate sales transaction	X	X
400K009	Process rain check sales transaction	X	
400K010	Redeem promotional coupon	X	X
400K011	Process back order for merchandise	X	X
400K012	Change cash register tape	X	X
400K013	Issue trading stamps	X	X
400K014	Redeem trading stamps	X	X
400K015	Update employee bulletin board		X